Minnesota Department of Employment and Economic Development

Review ONLINE

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# Minnesota Employment Review

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## Embracing the 'Rural Rebound' in the Northwest

Much has been made of the so-called 'brain drain' particularly in rural areas separated by distance and culture from the state's major metropolitan areas. This concept is often based solely on the exodus of 15- to 29-year-olds who leave hometowns for educational opportunities, career prospects, or to broaden their horizons.

Without question, population data show geographical movement of younger age groups. However, this trend typically is discussed out of context. The migration of people ages 15 to 29 is the rule rather than the exception in both rural and urban areas. Unfortunately, rural communities sometimes interpret the loss of their youth as a reflection on their community rather than a societal norm occurring throughout the state and country.

Since 2000 the only counties in Minnesota that experienced an increase in those busy 20- to 24-year-olds are home to four-year postsecondary institutions. In Northwest Minnesota Beltrami, Clay, and Stevens counties all welcomed net in-migration, with Beltrami and Clay expanding more than 25 percent between 2000 and 2010. Since 2000, all other Northwest Minnesota counties experienced net out-migration among 20- to 24-year-olds, as did every other county in the state without a university. Rather than some phenomenon unique to rural communities, data show that the loss of younger populations is constant among all counties without a four-year university (Figure 1).

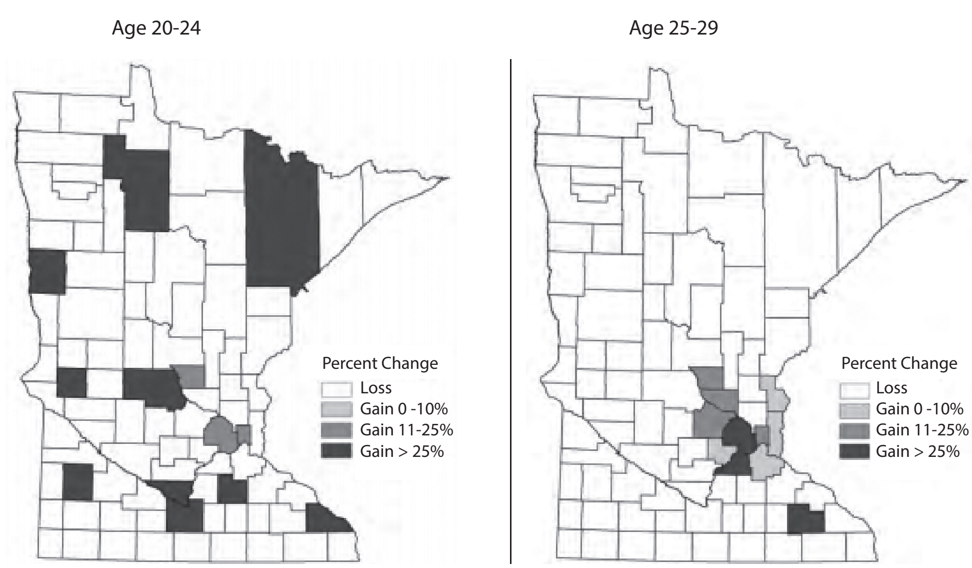
**Feature:**

Disability Employment in Minnesota

**In this issue:**



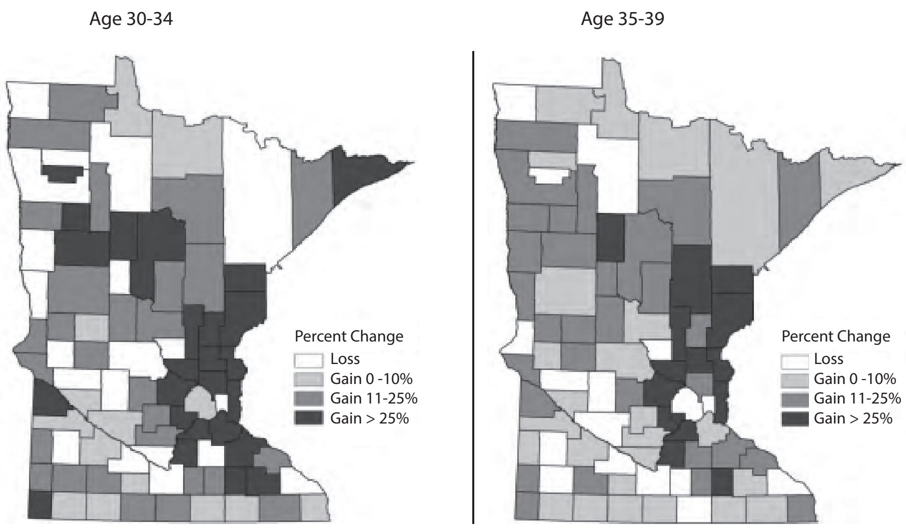
**Figure 1: Percent Population Change Age 20-29 Cohorts, 2000-2010**




Source: U.S. Census Bureau, 2000-2010

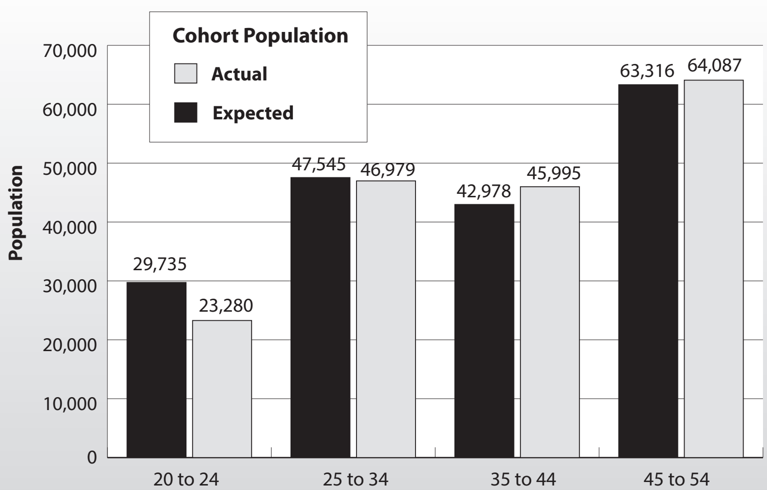
Regional Spotlight
NORTHWEST MINNESOTA

**Figure 2: Percent Population Change Age 30-39 Cohorts, 2000-2010**




Source: U.S. Census Bureau, 2000-2010

**FIgure 3: Population Migration by Age Group Rural Northwest Minnesota, 2009-2013**




Source: American Community Survey, 2009-2013 1-year estimates

U.S. Census data and new analysis from regional researchers and the University of Minnesota's Ben Winchester have identified other demographic shifts in Minnesota as well, adding significant nuance to the discussion of rural population changes.[1] Instead of a 'brain drain', many counties are experiencing a 'brain gain'. Winchester's research has pointed to an increase in population cohorts aged 30 to 49 in most rural Minnesota counties in what's known as the 'rural rebound'.

Using the Simplified Cohort Approach, age cohorts from 2000 were examined against 2010 data to capture how, if no migration took place, the expected number of people matched up to actual population numbers a decade later. For example, if Northwest Minnesota had 20,000 people aged 20 to 29 in 2000, the same number of people would be 'expected' to comprise the 30- to 39-age cohort in 2010. The difference between the expected number and the actual number represents the net in- or out-migration of a region or county.

Figure 2 shows that most counties in Northwest Minnesota saw an increase in the number of 30- to 39-year-olds from 2000 to 2010. According to the research, workers in these age groups are at the peak of their careers and often contribute more to their communities at large. Additionally, they are often highly educated, and bring more connections and resources from other areas.[2]

## *Northwest Minnesota Migration Trends*

In Northwest Minnesota, only Clay and Polk counties are designated as Metropolitan Statistical Areas, with Clay part of the Fargo-Moorhead MSA and Polk part of the Grand Forks-East Grand Forks MSA. While a good case can be made for an urban label for Beltrami County which has Bemidji State University, the remaining 24 rural counties traditionally find that a good portion of their young adults leave the area for other opportunities. Besides Clay with Moorhead State University and Stevens with the University of Minnesota-Morris, only Beltrami County with Bemidji State University experienced a net migration intake among the 20- to 24-year-old age cohorts from 2000-2010.

Current data estimates from the U.S. Census Bureau's American Community Survey allow migration patterns in Northwest Minnesota to be examined from the end of the recession through the current recovery. Rather than the 10-year period used in prior research, this article compares cohorts over a five-year span from 2009 to 2013. In the five-year timeframe, age groups are examined in the following cohorts: 25 to 34, 35 to 44, and 45 to 54.

[1]"Brain Gain in rural Minnesota." **www.extension.umn.edu/community/brain-gain/**.
[2]**www.extension.umn.edu/community/brain-gain/docs/continuing-the-trend.pdf**

These age ranges coincide with those often tracked for industry employment demographics, which adds context on workforce demographics to the overall analysis, and their activity can be significantly relevant to job seekers and employers alike.

## Regional Results

Since the end of the recession, migration trends throughout rural Northwest Minnesota mirror those found previously in rural areas across the state. There were nearly 6,000 fewer people ages 20 to 24 in rural Northwest Minnesota than expected, indicating an approximate 20 percent migration out of the region in this age group. But again, out-migration among 20 to 24 years olds is the rule, not the exception (Figure 3).

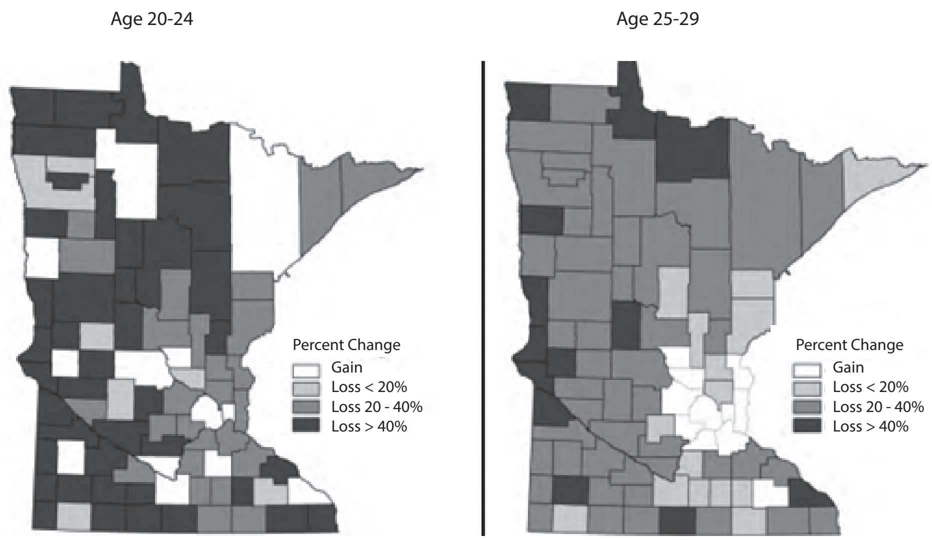
On the surface this sounds dire, but when compared to the earlier study examining 2000 to 2010, the amount of out-migration of 20-24 year olds actually decreased. In 18 of the 23 rural Northwest counties studied here, there was out-migration of more than 40 percent among this age group from 2000-2010 (Figure 4).

## Migration Variation among Young Professional Cohorts

Net out-migration occurred among 25- to 34-year-olds in Northwest Minnesota as well, where approximately 566 (1.8 percent) fewer were found in 2013 than in 2009. But considering that from 2000 to 2010 the average Northwest Minnesota county experienced a 20 to 40 percent net migration loss in ages 25 to 29 alone[3], the current trend is encouraging. From 2009-2013 Northwest Minnesota lost only 13 percent of people in this age cohort, while it added nearly as many individuals ages 30 to 34 in that time (Table 1).

This upward trend among 30- to 34-year-olds continues to offset the loss of 25- to 29-year-olds in the post-recession years. What's more, the loss of people in the 25 to 29 cohort looks to be diminishing. From 2000-2010, there was at least 20 percent out-migration in every Northwest county except Crow Wing (Figure 4).

**Figure 4: Percent Population Loss
Age 20-24 and 25-29 Year Cohorts, 2000-2010**




Source: U.S. Census Bureau, 2000-2010

## Middle Cohorts

Just as important to the economic health of the Northwest, if not more so, are the 35- to 54-year-old cohorts. These individuals make intangible contributions to their local economy and communities. As leaders, workers, and parents, their experience and know-how is rarely paralleled by younger generations. The Northwest not only maintained a high level of experience and expertise by retaining people in these age groups, but also continues to attract people in this demographic category. To anyone who's ever experienced the harsh conditions of a Northwest Minnesota winter, their in-migration speaks volumes about the region's economy and overall quality of life.

Altogether, Northwest Minnesota experienced a net out-migration of nearly 6,000 residents ages 20 to 24, and a net in-migration of approximately 2,000 people in age groups 25 to 54. Major gains appear to have occurred in the 30- to 44-age range to counter the continued out-migration among ages 25 to 29. More importantly, those migrating to the region are more experienced and educated, while those leaving are often just beginning their education and careers.

**Table 1: Population Change
25-34-year-old Cohorts, 2009-2013**

| Age Cohorts | Expected Population | Actual Population | Migration Number | Migration Percent |
|---|---|---|---|---|
| 25-29 | 25,573 | 22,162 | -3,411 | -13.3% |
| 30-34 | 21,972 | 24,817 | 2,845 | 11.5% |
| Total | 47,545 | 46,979 | -566 | -1.8% |

Source: American Community Survey, 2009-2013 1-year estimates

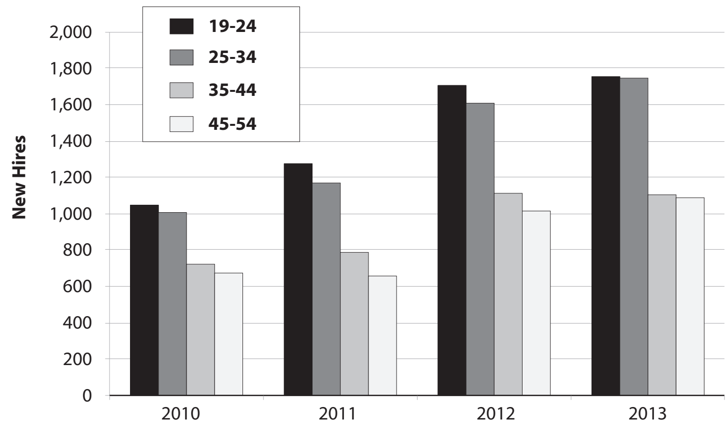
[3] www.extension.umn.edu/community/brain-gain/docs/continuing-the-trend.pdf

## *Manufacturing Hires*

How does this translate to the workforce in Northwest Minnesota? Research shows that population cohorts ages 30 and above are returning to the region and have a lot to offer, but it's less clear what effect their arrival is having on the regional workforce. Manufacturers and most other industries in the Northwest should be elated to learn about this rural renewal, if it isn't already apparent. The manufacturing industry has added almost 3,000 jobs since 2010, with many new workers from the 25- to 44-year-old age groups (Figure 5). Industry subsectors with the most new hires among these ages were Fabricated Metal Product Manufacturing, Wood Manufacturing, Food Manufacturing, and Transportation Equipment Manufacturing.

New hires in these age groups are often well educated, work-tested, and bring various connections with them to the industry. This is not to say younger workers are bad hires — far from it. Statistically speaking, they are simply more likely to migrate out of the area for other opportunities. Instead, the tenure of middle-age workers is often longer and turnover rates are lower, making the employer's investment more apt to pay off (Figure 6).

**Figure 5: New Manufacturing Hires by Age: Northwest Minnesota, 2010-2013**




Source: DEED Quarterly Workforce Indicators

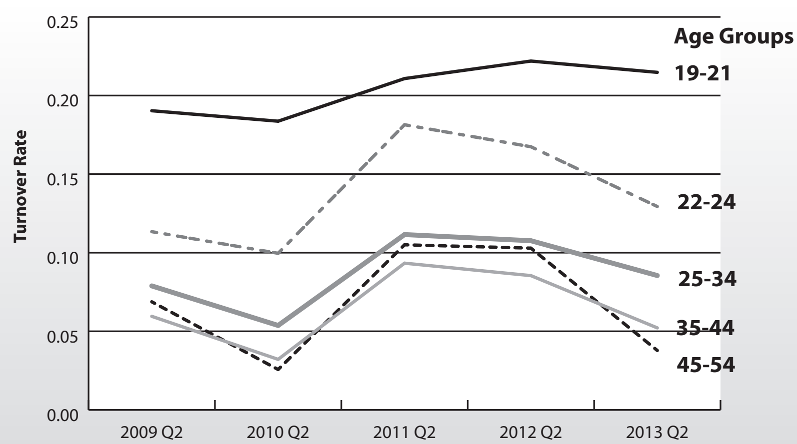
## *Conclusion*

While there is more to be explored, early research contradicts conventional wisdom that a loss of talent is plaguing rural areas in Northwest Minnesota. On the contrary, the rural renewal in Northwest Minnesota indicates our communities and industries are benefitting from a talent in-migration that offsets the typical out-migration of young adults to college towns and elsewhere. While this revelation falls short of answering all the challenges faced by Minnesota's rural communities, it has reenergized the conversation among community leaders about what can and should be done to welcome and retain newcomers. More specifically, rural communities may obtain a better grasp of who is moving to their communities, what needs they have, and what amenities they value.

Interestingly, most of the middle-aged migrators moving to the Northwest are doing so for the quality of life rather than the quantity of jobs. In 2010, survey research by the Upper Minnesota Valley Regional Development Commission (UMVRDC) found that the top reasons for migration to rural Minnesota were 1) a desire for a simpler life; 2) safety and security; 3) affordable housing; 4) outdoor recreation; and 5) for those with children, locating a quality school. Surprisingly, jobs were not listed among the top ten reasons people relocated to rural areas.[4]

But most newcomers to the Northwest need good jobs too, and the manufacturing industry has been more than happy to provide them. Further research on where this influx of talent is finding work should also be of significant interest to employers and other job seekers.

**Figure 6: Manufacturing Turnover Rates by Age Cohort,2009-2013**




Source: DEED Quarterly Workforce Indicators

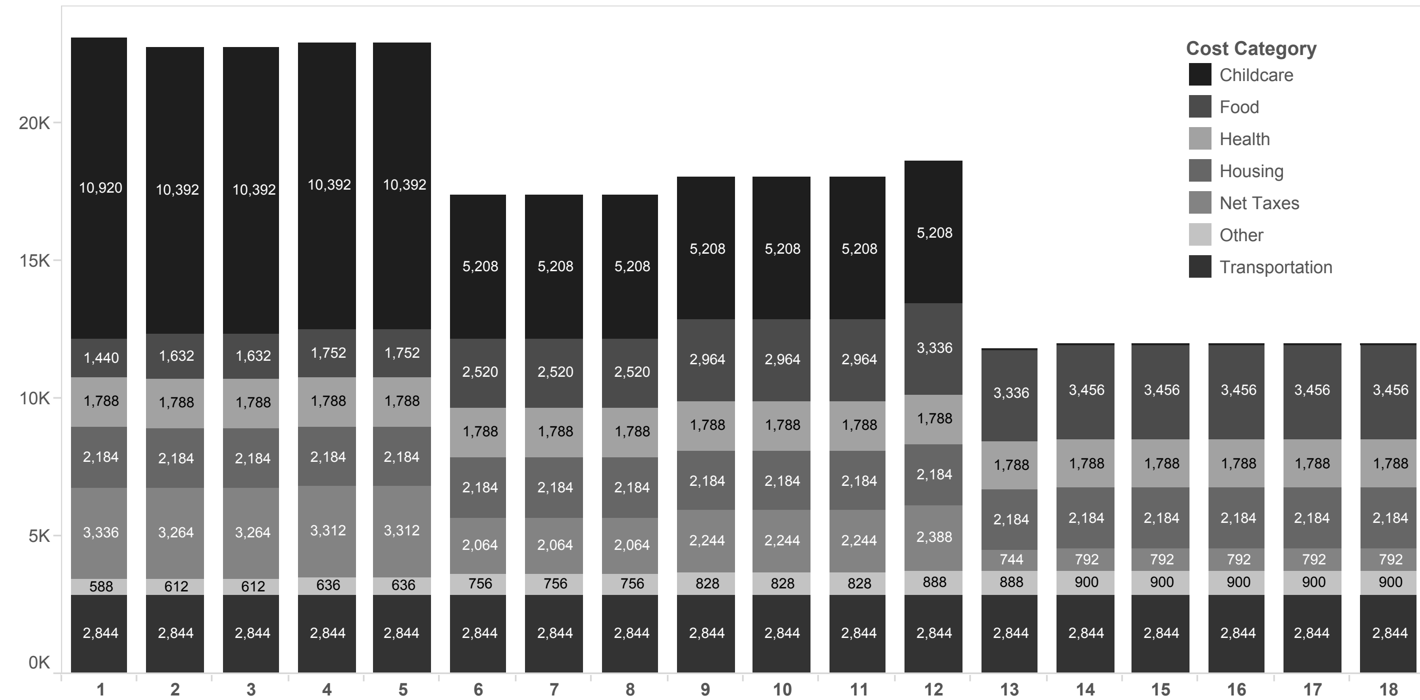
*by Chet Bodin*
*Regional Analyst, NW Minnesota*
*Department of Employment and Economic Development*

[4]www.edacenter.org/downloads/Ben_Winchester_Report_2.pdf

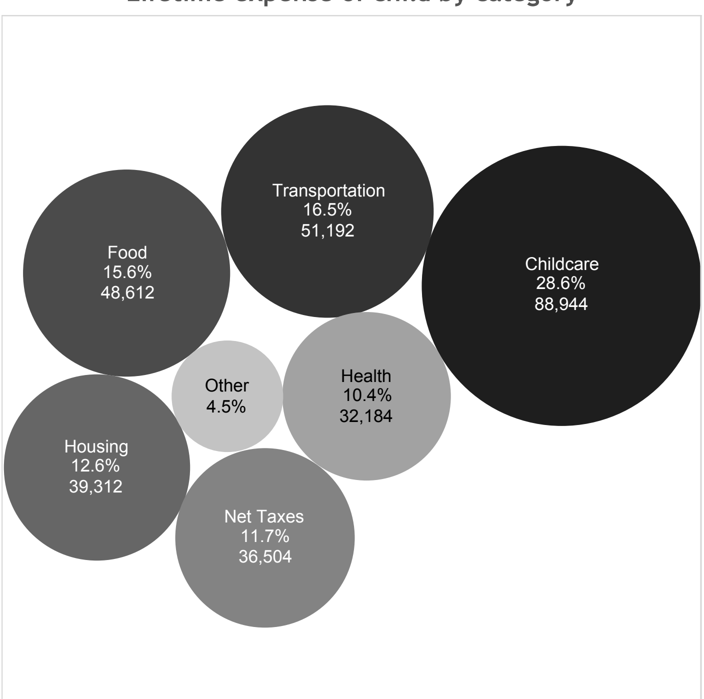
Regional Spotlight NORTHWEST MINNESOTA

## Cost of Living and Children

### Costs by Category and Age




### Lifetime expense of child by category




Minnesota's Cost of Living Calculator breaks out expenses for children of all ages. The costs of daycare, food, and housing can all vary by age.

This infographic looks at a statewide average for two-parent dual-income households with one child. The costs listed are those in excess of the same couple without children - it approximates the costs a couple incurs in each year of their child's life.

Childcare is the single largest expense, with Transportation, Food, and Housing also significant.

Note: The Cost of Living Calculator is intended to approximate the minimum expense of living safely and healthfully. Some families spend much more to feed or educate their children, and some families cut costs by relying on family. This is a baseline measure and cannot accommodate every variation.

Check online for the full Cost of Living Calculator:
http://mn.gov/deed/data/data-tools/col/

*by Amanda Rohrer*

# Labor Force Estimates

| County/Area | Labor Force | | | Employment | | | Unemployment | | | Rate of Unemployment | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept 2014 | Aug 2014 | Sept 2013 | Sept 2014 | Aug 2014 | Sept 2013 | Sept 2014 | Aug 2014 | Sept 2013 | Sept 2014 | Aug 2014 | Sept 2013 |
| **United States ('000s)** | | | | | | | | | | | | |
| (Seasonally adjusted) | 155,862 | 155,959 | 155,559 | 146,600 | 146,368 | 144,303 | 9,262 | 9,591 | 11,255 | 5.9% | 6.1% | 7.2% |
| (Unadjusted) | 155,903 | 156,434 | 155,536 | 146,941 | 146,647 | 144,651 | 8,962 | 9,787 | 10,885 | 5.7 | 6.3 | 7.0 |
| **Minnesota** | | | | | | | | | | | | |
| (Seasonally adjusted) | 2,982,884 | 2,981,147 | 2,968,482 | 2,860,787 | 2,852,956 | 2,822,623 | 122,097 | 128,191 | 145,859 | 4.1 | 4.3 | 4.9 |
| (Unadjusted) | 2,989,818 | 3,002,076 | 2,977,653 | 2,881,553 | 2,887,356 | 2,841,993 | 108,265 | 114,720 | 135,660 | 3.6 | 3.8 | 4.6 |
| **Metropolitan Statistical Areas (MSA)*** | | | | | | | | | | | | |
| Mpls.-St. Paul MSA | 1,880,743 | 1,889,188 | 1,865,760 | 1,812,810 | 1,817,491 | 1,780,291 | 67,933 | 71,697 | 85,469 | 3.6 | 3.8 | 4.6 |
| Duluth-Superior MSA | 144,067 | 144,314 | 144,602 | 137,777 | 137,447 | 136,596 | 6,290 | 6,867 | 8,006 | 4.4 | 4.8 | 5.5 |
| Rochester MSA | 105,679 | 107,110 | 105,127 | 102,440 | 103,589 | 101,036 | 3,239 | 3,521 | 4,091 | 3.1 | 3.3 | 3.9 |
| St. Cloud MSA | 109,252 | 109,382 | 108,510 | 105,422 | 105,389 | 103,774 | 3,830 | 3,993 | 4,736 | 3.5 | 3.7 | 4.4 |
| Mankato-N Mankato MSA | 59,519 | 58,278 | 58,143 | 57,775 | 56,415 | 55,967 | 1,744 | 1,863 | 2,176 | 2.9 | 3.2 | 3.7 |
| Fargo-Moorhead MSA | 123,815 | 124,849 | 121,929 | 120,977 | 121,801 | 118,882 | 2,838 | 3,048 | 3,047 | 2.3 | 2.4 | 2.5 |
| Grand Forks MSA | 53,563 | 52,400 | 53,790 | 52,086 | 50,736 | 52,234 | 1,477 | 1,664 | 1,556 | 2.8 | 3.2 | 2.9 |
| **Region One** | **50,898** | **49,814** | **50,957** | **49,272** | **47,982** | **48,978** | **1,626** | **1,832** | **1,979** | **3.2** | **3.7** | **3.9** |
| Kittson | 2,640 | 2,640 | 2,666 | 2,555 | 2,542 | 2,558 | 85 | 98 | 108 | 3.2 | 3.7 | 4.1 |
| Marshall | 5,663 | 5,554 | 5,706 | 5,445 | 5,316 | 5,435 | 218 | 238 | 271 | 3.8 | 4.3 | 4.7 |
| Norman | 3,497 | 3,487 | 3,609 | 3,368 | 3,357 | 3,452 | 129 | 130 | 157 | 3.7 | 3.7 | 4.4 |
| Pennington | 9,785 | 9,649 | 9,716 | 9,510 | 9,342 | 9,342 | 275 | 307 | 374 | 2.8 | 3.2 | 3.8 |
| Polk | 17,873 | 17,230 | 17,740 | 17,279 | 16,541 | 17,079 | 594 | 689 | 661 | 3.3 | 4.0 | 3.7 |
| Red Lake | 2,303 | 2,281 | 2,313 | 2,226 | 2,190 | 2,214 | 77 | 91 | 99 | 3.3 | 4.0 | 4.3 |
| Roseau | 9,137 | 8,973 | 9,207 | 8,889 | 8,694 | 8,898 | 248 | 279 | 309 | 2.7 | 3.1 | 3.4 |
| **Region Two** | **40,688** | **40,893** | **40,773** | **38,717** | **38,751** | **38,442** | **1,971** | **2,142** | **2,331** | **4.8** | **5.2** | **5.7** |
| Beltrami | 22,160 | 22,160 | 22,197 | 21,148 | 21,069 | 20,967 | 1,012 | 1,091 | 1,230 | 4.6 | 4.9 | 5.5 |
| Clearwater | 4,234 | 4,163 | 4,221 | 3,928 | 3,836 | 3,898 | 306 | 327 | 323 | 7.2 | 7.9 | 7.7 |
| Hubbard | 9,525 | 9,756 | 9,575 | 9,083 | 9,270 | 9,034 | 442 | 486 | 541 | 4.6 | 5.0 | 5.7 |
| Lake of the Woods | 2,305 | 2,386 | 2,286 | 2,201 | 2,267 | 2,170 | 104 | 119 | 116 | 4.5 | 5.0 | 5.1 |
| Mahnomen | 2,464 | 2,428 | 2,494 | 2,357 | 2,309 | 2,373 | 107 | 119 | 121 | 4.3 | 4.9 | 4.9 |
| **Region Three** | **167,237** | **168,128** | **168,434** | **159,730** | **160,112** | **158,931** | **7,507** | **8,016** | **9,503** | **4.5** | **4.8** | **5.6** |
| Aitkin | 7,189 | 7,148 | 7,338 | 6,851 | 6,791 | 6,927 | 338 | 357 | 411 | 4.7 | 5.0 | 5.6 |
| Carlton | 17,623 | 17,572 | 17,677 | 16,862 | 16,829 | 16,731 | 761 | 743 | 946 | 4.3 | 4.2 | 5.4 |
| Cook | 3,600 | 3,768 | 3,575 | 3,484 | 3,641 | 3,448 | 116 | 127 | 127 | 3.2 | 3.4 | 3.6 |
| Itasca | 22,460 | 22,787 | 22,688 | 21,277 | 21,549 | 21,269 | 1,183 | 1,238 | 1,419 | 5.3 | 5.4 | 6.3 |
| Koochiching | 6,492 | 6,617 | 6,555 | 6,035 | 6,124 | 6,087 | 457 | 493 | 468 | 7.0 | 7.5 | 7.1 |
| Lake | 6,432 | 6,592 | 6,547 | 6,223 | 6,372 | 6,236 | 209 | 220 | 311 | 3.2 | 3.3 | 4.8 |
| St. Louis | 103,441 | 103,644 | 104,054 | 98,998 | 98,806 | 98,233 | 4,443 | 4,838 | 5,821 | 4.3 | 4.7 | 5.6 |
| City of Duluth | 45,653 | 45,611 | 45,702 | 43,699 | 43,615 | 43,362 | 1,954 | 1,996 | 2,340 | 4.3 | 4.4 | 5.1 |
| Balance of St. Louis County | 57,788 | 58,033 | 58,352 | 55,299 | 55,191 | 54,871 | 2,489 | 2,842 | 3,481 | 4.3 | 4.9 | 6.0 |
| **Region Four** | **128,140** | **130,281** | **127,271** | **124,398** | **126,358** | **122,738** | **3,742** | **3,923** | **4,533** | **2.9** | **3.0** | **3.6** |
| Becker | 18,081 | 19,580 | 18,002 | 17,472 | 18,910 | 17,259 | 609 | 670 | 743 | 3.4 | 3.4 | 4.1 |
| Clay | 35,515 | 35,108 | 34,547 | 34,658 | 34,253 | 33,537 | 857 | 855 | 1,010 | 2.4 | 2.4 | 2.9 |
| Douglas | 21,367 | 21,802 | 21,295 | 20,762 | 21,163 | 20,543 | 605 | 639 | 752 | 2.8 | 2.9 | 3.5 |
| Grant | 3,215 | 3,244 | 3,256 | 3,104 | 3,124 | 3,119 | 111 | 120 | 137 | 3.5 | 3.7 | 4.2 |
| Otter Tail | 31,126 | 31,872 | 31,352 | 30,062 | 30,744 | 30,053 | 1,064 | 1,128 | 1,299 | 3.4 | 3.5 | 4.1 |
| Pope | 6,674 | 6,669 | 6,665 | 6,499 | 6,481 | 6,444 | 175 | 188 | 221 | 2.6 | 2.8 | 3.3 |
| Stevens | 6,468 | 6,406 | 6,526 | 6,325 | 6,260 | 6,348 | 143 | 146 | 178 | 2.2 | 2.3 | 2.7 |
| Traverse | 1,735 | 1,755 | 1,792 | 1,675 | 1,694 | 1,721 | 60 | 61 | 71 | 3.5 | 3.5 | 4.0 |
| Wilkin | 3,959 | 3,845 | 3,836 | 3,841 | 3,729 | 3,714 | 118 | 116 | 122 | 3.0 | 3.0 | 3.2 |
| **Region Five** | **83,339** | **84,304** | **84,117** | **79,768** | **80,536** | **79,613** | **3,571** | **3,768** | **4,504** | **4.3** | **4.5** | **5.4** |
| Cass | 14,032 | 14,279 | 14,109 | 13,359 | 13,535 | 13,303 | 673 | 744 | 806 | 4.8 | 5.2 | 5.7 |
| Crow Wing | 33,630 | 34,075 | 33,989 | 32,195 | 32,618 | 32,059 | 1,435 | 1,457 | 1,930 | 4.3 | 4.3 | 5.7 |
| Morrison | 17,238 | 17,379 | 17,347 | 16,496 | 16,594 | 16,467 | 742 | 785 | 880 | 4.3 | 4.5 | 5.1 |
| Todd | 12,324 | 12,401 | 12,459 | 11,896 | 11,924 | 11,924 | 428 | 477 | 535 | 3.5 | 3.8 | 4.3 |
| Wadena | 6,115 | 6,170 | 6,213 | 5,822 | 5,865 | 5,860 | 293 | 305 | 353 | 4.8 | 4.9 | 5.7 |
| **Region Six East** | **67,056** | **67,275** | **67,429** | **64,788** | **64,778** | **64,540** | **2,268** | **2,497** | **2,889** | **3.4** | **3.7** | **4.3** |
| Kandiyohi | 25,001 | 25,027 | 25,047 | 24,231 | 24,186 | 24,107 | 770 | 841 | 940 | 3.1 | 3.4 | 3.8 |
| McLeod | 20,262 | 20,502 | 20,182 | 19,530 | 19,700 | 19,243 | 732 | 802 | 939 | 3.6 | 3.9 | 4.7 |
| Meeker | 12,604 | 12,616 | 12,671 | 12,170 | 12,149 | 12,117 | 434 | 467 | 554 | 3.4 | 3.7 | 4.4 |
| Renville | 9,189 | 9,130 | 9,529 | 8,857 | 8,743 | 9,073 | 332 | 387 | 456 | 3.6 | 4.2 | 4.8 |

*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

# Labor Force Estimates

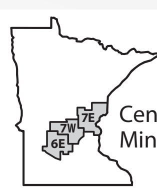
Numbers are unadjusted unless otherwise labeled.
Source: Department of Employment and Economic Development, Local Area Unemployment Statistics, and North Dakota Job Service, 2014.

| County/Area | Labor Force | | | Employment | | | Unemployment | | | Rate of Unemployment | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept 2014 | Aug 2014 | Sept 2013 | Sept 2014 | Aug 2014 | Sept 2013 | Sept 2014 | Aug 2014 | Sept 2013 | Sept 2014 | Aug 2014 | Sept 2013 |
| **Region Six West** | **24,334** | **24,215** | **24,789** | **23,572** | **23,340** | **23,772** | **762** | **875** | **1,017** | **3.1%** | **3.6%** | **4.1%** |
| Big Stone | 2,673 | 2,691 | 2,747 | 2,599 | 2,604 | 2,643 | 74 | 87 | 104 | 2.8 | 3.2 | 3.8 |
| Chippewa | 7,141 | 7,141 | 7,220 | 6,911 | 6,875 | 6,936 | 230 | 266 | 284 | 3.2 | 3.7 | 3.9 |
| Lac Qui Parle | 3,981 | 3,870 | 4,076 | 3,858 | 3,737 | 3,912 | 123 | 133 | 164 | 3.1 | 3.4 | 4.0 |
| Swift | 5,050 | 5,078 | 5,176 | 4,878 | 4,880 | 4,939 | 172 | 198 | 237 | 3.4 | 3.9 | 4.6 |
| Yellow Medicine | 5,489 | 5,435 | 5,570 | 5,326 | 5,244 | 5,342 | 163 | 191 | 228 | 3.0 | 3.5 | 4.1 |
| **Region Seven East** | **82,999** | **83,334** | **82,832** | **79,373** | **79,538** | **78,422** | **3,626** | **3,796** | **4,410** | **4.4** | **4.6** | **5.3** |
| Chisago | 28,228 | 28,344 | 27,978 | 27,164 | 27,237 | 26,682 | 1,064 | 1,107 | 1,296 | 3.8 | 3.9 | 4.6 |
| Isanti | 20,582 | 20,681 | 20,424 | 19,825 | 19,878 | 19,473 | 757 | 803 | 951 | 3.7 | 3.9 | 4.7 |
| Kanabec | 7,992 | 8,045 | 8,043 | 7,504 | 7,550 | 7,484 | 488 | 495 | 559 | 6.1 | 6.2 | 7.0 |
| Mille Lacs | 11,996 | 12,082 | 12,059 | 11,350 | 11,397 | 11,277 | 646 | 685 | 782 | 5.4 | 5.7 | 6.5 |
| Pine | 14,201 | 14,182 | 14,328 | 13,530 | 13,476 | 13,506 | 671 | 706 | 822 | 4.7 | 5.0 | 5.7 |
| **Region Seven West** | **228,271** | **228,972** | **226,417** | **220,247** | **220,523** | **216,562** | **8,024** | **8,449** | **9,855** | **3.5** | **3.7** | **4.4** |
| Benton | 22,615 | 22,589 | 22,475 | 21,757 | 21,750 | 21,416 | 858 | 839 | 1,059 | 3.8 | 3.7 | 4.7 |
| Sherburne | 49,362 | 49,505 | 48,838 | 47,474 | 47,602 | 46,632 | 1,888 | 1,903 | 2,206 | 3.8 | 3.8 | 4.5 |
| Stearns | 86,637 | 86,793 | 86,035 | 83,665 | 83,639 | 82,358 | 2,972 | 3,154 | 3,677 | 3.4 | 3.6 | 4.3 |
| Wright | 69,657 | 70,085 | 69,069 | 67,351 | 67,532 | 66,156 | 2,306 | 2,553 | 2,913 | 3.3 | 3.6 | 4.2 |
| **Region Eight** | **69,101** | **68,790** | **69,728** | **67,072** | **66,727** | **67,310** | **2,029** | **2,063** | **2,418** | **2.9** | **3.0** | **3.5** |
| Cottonwood | 6,373 | 6,286 | 6,460 | 6,120 | 6,062 | 6,214 | 253 | 224 | 246 | 4.0 | 3.6 | 3.8 |
| Jackson | 7,660 | 7,649 | 7,536 | 7,389 | 7,419 | 7,301 | 271 | 230 | 235 | 3.5 | 3.0 | 3.1 |
| Lincoln | 3,462 | 3,477 | 3,502 | 3,362 | 3,370 | 3,390 | 100 | 107 | 112 | 2.9 | 3.1 | 3.2 |
| Lyon | 15,019 | 14,825 | 15,101 | 14,601 | 14,371 | 14,570 | 418 | 454 | 531 | 2.8 | 3.1 | 3.5 |
| Murray | 5,980 | 5,922 | 6,033 | 5,839 | 5,774 | 5,854 | 141 | 148 | 179 | 2.4 | 2.5 | 3.0 |
| Nobles | 11,349 | 11,299 | 11,508 | 11,036 | 10,972 | 11,105 | 313 | 327 | 403 | 2.8 | 2.9 | 3.5 |
| Pipestone | 5,613 | 5,670 | 5,714 | 5,477 | 5,526 | 5,536 | 136 | 144 | 178 | 2.4 | 2.5 | 3.1 |
| Redwood | 7,953 | 8,048 | 8,139 | 7,679 | 7,752 | 7,781 | 274 | 296 | 358 | 3.4 | 3.7 | 4.4 |
| Rock | 5,692 | 5,614 | 5,735 | 5,569 | 5,481 | 5,559 | 123 | 133 | 176 | 2.2 | 2.4 | 3.1 |
| **Region Nine** | **132,575** | **132,000** | **132,095** | **128,134** | **127,232** | **126,635** | **4,441** | **4,768** | **5,460** | **3.3** | **3.6** | **4.1** |
| Blue Earth | 39,560 | 38,753 | 38,660 | 38,358 | 37,455 | 37,157 | 1,202 | 1,298 | 1,503 | 3.0 | 3.3 | 3.9 |
| Brown | 15,528 | 15,830 | 15,698 | 15,052 | 15,310 | 15,089 | 476 | 520 | 609 | 3.1 | 3.3 | 3.9 |
| Faribault | 7,317 | 7,402 | 7,469 | 7,034 | 7,086 | 7,120 | 283 | 316 | 349 | 3.9 | 4.3 | 4.7 |
| Le Sueur | 15,220 | 15,226 | 14,990 | 14,614 | 14,589 | 14,270 | 606 | 637 | 720 | 4.0 | 4.2 | 4.8 |
| Martin | 10,265 | 10,626 | 10,610 | 9,866 | 10,196 | 10,118 | 399 | 430 | 492 | 3.9 | 4.0 | 4.6 |
| Nicollet | 19,959 | 19,525 | 19,483 | 19,417 | 18,960 | 18,810 | 542 | 565 | 673 | 2.7 | 2.9 | 3.5 |
| Sibley | 9,518 | 9,430 | 9,724 | 9,223 | 9,113 | 9,343 | 295 | 317 | 381 | 3.1 | 3.4 | 3.9 |
| Waseca | 9,767 | 9,818 | 9,957 | 9,358 | 9,384 | 9,479 | 409 | 434 | 478 | 4.2 | 4.4 | 4.8 |
| Watonwan | 5,441 | 5,390 | 5,504 | 5,212 | 5,139 | 5,249 | 229 | 251 | 255 | 4.2 | 4.7 | 4.6 |
| **Region Ten** | **274,392** | **275,869** | **274,488** | **265,347** | **266,082** | **262,962** | **9,045** | **9,787** | **11,526** | **3.3** | **3.5** | **4.2** |
| Dodge | 11,161 | 11,347 | 11,099 | 10,819 | 10,940 | 10,671 | 342 | 407 | 428 | 3.1 | 3.6 | 3.9 |
| Fillmore | 11,405 | 11,460 | 11,505 | 11,029 | 11,051 | 11,038 | 376 | 409 | 467 | 3.3 | 3.6 | 4.1 |
| Freeborn | 16,136 | 16,087 | 16,382 | 15,547 | 15,472 | 15,614 | 589 | 615 | 768 | 3.7 | 3.8 | 4.7 |
| Goodhue | 25,672 | 25,825 | 25,642 | 24,785 | 24,884 | 24,500 | 887 | 941 | 1,142 | 3.5 | 3.6 | 4.5 |
| Houston | 10,535 | 10,488 | 10,529 | 10,179 | 10,104 | 10,047 | 356 | 384 | 482 | 3.4 | 3.7 | 4.6 |
| Mower | 21,246 | 21,403 | 21,362 | 20,570 | 20,681 | 20,491 | 676 | 722 | 871 | 3.2 | 3.4 | 4.1 |
| Olmsted | 82,735 | 83,795 | 82,328 | 80,219 | 81,119 | 79,119 | 2,516 | 2,676 | 3,209 | 3.0 | 3.2 | 3.9 |
| City of Rochester | 60,454 | 61,237 | 60,197 | 58,557 | 59,213 | 57,754 | 1,897 | 2,024 | 2,443 | 3.1 | 3.3 | 4.1 |
| Rice | 32,677 | 32,727 | 32,726 | 31,412 | 31,330 | 31,144 | 1,265 | 1,397 | 1,582 | 3.9 | 4.3 | 4.8 |
| Steele | 21,919 | 21,753 | 21,963 | 21,234 | 21,008 | 21,090 | 685 | 745 | 873 | 3.1 | 3.4 | 4.0 |
| Wabasha | 11,783 | 11,968 | 11,701 | 11,402 | 11,530 | 11,246 | 381 | 438 | 455 | 3.2 | 3.7 | 3.9 |
| Winona | 29,123 | 29,016 | 29,251 | 28,151 | 27,963 | 28,002 | 972 | 1,053 | 1,249 | 3.3 | 3.6 | 4.3 |
| **Region Eleven** | **1,640,788** | **1,648,197** | **1,628,327** | **1,581,136** | **1,585,393** | **1,553,091** | **59,652** | **62,804** | **75,236** | **3.6** | **3.8** | **4.6** |
| Anoka | 191,639 | 192,363 | 190,148 | 184,588 | 185,085 | 181,314 | 7,051 | 7,278 | 8,834 | 3.7 | 3.8 | 4.6 |
| Carver | 51,694 | 51,983 | 51,311 | 49,977 | 50,112 | 49,091 | 1,717 | 1,871 | 2,220 | 3.3 | 3.6 | 4.3 |
| Dakota | 234,371 | 235,526 | 232,522 | 226,199 | 226,808 | 222,187 | 8,172 | 8,718 | 10,335 | 3.5 | 3.7 | 4.4 |
| Hennepin | 673,024 | 676,200 | 668,408 | 648,386 | 650,132 | 636,885 | 24,638 | 26,068 | 31,523 | 3.7 | 3.9 | 4.7 |
| City of Bloomington | 49,570 | 49,789 | 49,212 | 47,799 | 47,927 | 46,951 | 1,771 | 1,862 | 2,261 | 3.6 | 3.7 | 4.6 |
| City of Minneapolis | 219,765 | 220,876 | 218,319 | 211,232 | 211,801 | 207,486 | 8,533 | 9,075 | 10,833 | 3.9 | 4.1 | 5.0 |
| Ramsey | 277,970 | 279,294 | 275,669 | 267,118 | 267,837 | 262,380 | 10,852 | 11,457 | 13,289 | 3.9 | 4.1 | 4.8 |
| City of St. Paul | 148,326 | 149,087 | 147,288 | 142,127 | 142,509 | 139,606 | 6,199 | 6,578 | 7,682 | 4.2 | 4.4 | 5.2 |
| Scott | 135,539 | 136,018 | 134,307 | 130,830 | 131,182 | 128,509 | 4,709 | 4,836 | 5,798 | 3.5 | 3.6 | 4.3 |
| Washington | 76,551 | 76,813 | 75,962 | 74,038 | 74,237 | 72,725 | 2,513 | 2,576 | 3,237 | 3.3 | 3.4 | 4.3 |

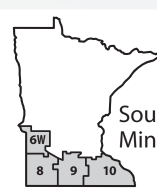
Minneapolis/ St. Paul

Northeast Minnesota

Northwest Minnesota



Central Minnesota



Southern Minnesota

# Industrial Analysis

Monthly analysis is based on ***seasonally adjusted*** employment data; yearly analysis is based on ***unadjusted*** employment data.*

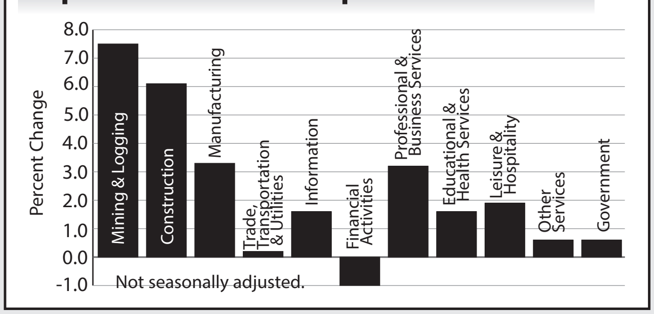
## *Overview*

Seasonally adjusted employment spiked in September as Minnesota added 7,200 jobs (0.3 percent) over the month. This increase comes even after August employment was revised upward, adding 2,700 jobs to the preliminary estimate to come in at 2,827,500. Significant seasonal growth occurred in Professional and Business Services (up 4,100 or 1.2 percent), Leisure and Hospitality (up 3,900, 1.6 percent), and Other Services (up 1,300, 1.1 percent) among other supersectors. The only supersectors to show losses were Mining and Logging (down 200, 2.6 percent), Financial Activities (down 400, 0.2 percent), and Government (down 4,200, 1.0 percent). Private employers as a group added 11,400 jobs (0.5 percent) as goods producers and service providers both grew by 0.3 percent (1,100 and 6,100 jobs, respectively). Annually, the state has gained 45,098 nonfarm jobs (1.6 percent). There was annual employment growth in every supersector except Financial Activities which lost 1,752 jobs (1 percent) over the year.

## *Mining and Logging*

Employment in the Mining and Logging supersector was down slightly in September, giving back some of their large increase from August to settle at 7,400, down 200 jobs or 2.6 percent. For the year, Mining and Logging has gained 541 jobs or 7.5 percent.

**MN Employment Growth**
**September 2013 to September 2014**




Source: Department of Employment and Economic Development, Current Employment Statistics, 2014.

## *Construction*

Construction employment jumped slightly in September, adding 200 jobs (0.2 percent) over August estimates. Employment remains strong on an annual basis as well, growing by 6,996 (6.1 percent). Annual growth is largely from big increases in Heavy and Civil Engineering Construction (up 3,688 or 19.7 percent) and Specialty Trade Contractors (up 5,096, 7.2 percent).

## *Manufacturing*

Employment levels in Manufacturing grew in September as the supersector added 1,100 jobs (0.3 percent) since August. The increase came entirely from a strong month for Nondurable Goods Manufacturing (up 1,200 jobs, 1.1 percent) as Durable Goods employment was largely static, losing 100 jobs (0.0 percent). On the year, Manufacturing employment continues to grow, up 10,376 jobs (3.3 percent) over the past 12 months. Durable and Non-Durable goods manufacturing have both shown significant job growth, up 4.2 and 1.9 percent, respectively.

## *Trade, Transportation, and Utilities*

Employment in Trade, Transportation, and Utilities was up slightly in September, growing by 300 jobs (0.1 percent). Small seasonally adjusted losses in Retail Trade (down 400, 0.1 percent) and in Transportation, Warehousing, and Utilities (down 200, 0.2 percent) were offset by the addition of 900 jobs (0.7 percent) in Wholesale Trade. On the year, employment in the supersector is up 1,007 jobs (0.2 percent) as gains in Wholesale Trade (1,391, 1.1 percent) again made up for losses in Retail Trade (down 860, 0.3 percent), with Transportation, Warehousing, and Utilities also up slightly, adding 476 jobs (0.5 percent).

## *Information*

Information employment was unchanged in September, remaining level at 54,500. For the year, the supersector remains up slightly, adding 851 jobs (1.6 percent) over September 2013. This is in spite of significant employment declines in the two published component industry groups, as Publishing Industries (except Internet) lost 685 jobs (3.2 percent) and Telecommunications lost 165 jobs (1.2 percent).

*Over-the-year data are not seasonally adjusted because of small changes in seasonal adjustment factors from year to year. Also, there is no seasonality in over-the-year changes.

## Financial Activities

Financial Activities employment continued its seasonally adjusted decline in September, losing 400 jobs (0.2 percent) on the month. The decline was split evenly between the two component industries, Finance and Insurance (down 0.1 percent) and Real Estate and Rental and Leasing (down 0.5 percent), which both lost 200 jobs. Employment in the supersector is also down for the year, off 1,752 jobs (1.0 percent) from September 2013.

## Professional and Business Services

Professional and Business Services added a significant number of jobs in September as employment grew by 4,100 (1.2 percent) over August estimates on the strength of 2,700 additional jobs in Professional, Scientific, and Technical Services (1.9 percent) and 1,200 jobs in Administrative and Support Services (0.9 percent). Annually, employment grew by 11,161 (3.2 percent) with increases in every major component industry group. The largest numerical increase came in Professional, Scientific, and Technical Services (up 5,628, 4.2 percent) and the largest proportional increase was in Services to Buildings and Dwellings (up 3,877, 13.1 percent).

## Educational and Health Services

Employment in Educational and Health Services was up by 1,100 (0.2 percent) in September, buoyed by increases in both Educational Services (up 100, 0.1 percent) and Health Care and Social Assistance (up 1,000, 0.2 percent). For the year, the supersector's employment was up 8,022 (1.6 percent) on the backs of increases in Ambulatory Health Care Services (up 4,804, 3.5 percent), Social Assistance (up 2,841, 3.6 percent), and Elementary and Secondary Schools (up 1,218, 5.9 percent).

## Leisure and Hospitality

Employment in Leisure and Hospitality displayed strong growth in September as the supersector added 3,900 jobs (1.6 percent). The increase came entirely in Accommodation and Food Service, which added 4,300 jobs (2.0 percent) as the other component sector, Arts, Entertainment, and Recreation, lost 400 jobs (1.0 percent). Annually, Leisure and Hospitality employment is up 4,901 (1.9 percent), with growth similarly focused in Accommodation and Food Services, and more specifically in Food Services and Drinking Places, which added 6,755 jobs (3.6 percent), representing the lion's share of the supersector's annual growth.

## Other Services

Other Services employment grew sharply in September; 1,300 jobs (1.1 percent) were added. The supersector has not seen a month of more dramatic seasonally adjusted growth since July 2003 when 1,400 jobs were added. The annual growth is less extreme, with the supersector adding just 678 jobs (0.6 percent) since September 2013, the majority of that growth coming in Religious, Grantmaking, Civic, Professional, and Similar Organizations.

## Government

Government employers shed 4,200 jobs (1.0 percent) in September, with Federal employers holding steady and State and Local Government losing 1,600 and 2,600 jobs, respectively. Annually, Government employment is up slightly, with 2,347 more jobs (0.6 percent) than in September 2013. Most of the movement appears to be coming in education. Local Government Educational Services has added 5,332 jobs (4.2 percent) making up for a loss of 3,016 (4.7 percent) in State Government Educational Services.

*by Nick Dobbins*

## Seasonally Adjusted Nonfarm Employment

In 1,000's

| Industry | Sept 2014 | Aug 2014 | July 2014 |
|---|---|---|---|
| **Total Nonagricultural** | **2,834.7** | **2,827.5** | **2,818.7** |
| **Goods-Producing** | **435.4** | **434.3** | **430.6** |
| Mining and Logging | 7.4 | 7.6 | 7.3 |
| Construction | 110.2 | 110.0 | 107.7 |
| Manufacturing | 317.8 | 316.7 | 315.6 |
| **Service-Providing** | **2,399.3** | **2,393.2** | **2,388.1** |
| Trade, Transportation, and Utilities | 514.1 | 513.8 | 514.2 |
| Information | 54.5 | 54.5 | 54.2 |
| Financial Activities | 179.0 | 179.4 | 180.2 |
| Professional and Business Services | 359.6 | 355.5 | 353.5 |
| Educational and Health Services | 500.5 | 499.4 | 497.5 |
| Leisure and Hospitality | 255.1 | 251.2 | 250.0 |
| Other Services | 118.7 | 117.4 | 117.2 |
| Government | 417.8 | 422.0 | 421.3 |

Source: Department of Employment and Economic Development Current Employment Statistics, 2014.

# Regional Analysis

Monthly analysis is based on ***unadjusted*** employment data.

## *Minneapolis-St. Paul-Bloomington Metropolitan Statistical Area (MSA)*

Employment was up slightly before seasonal adjustment in September, as the metro added 1,371 jobs (0.1 percent). The gain came largely from the public sector, as private employers lost 9,628 jobs (0.6 percent). Government employment, on the other hand, was up 10,999 (4.8 percent) on the month. This government employment increase was a common trait in all metros this month as schools ramped up hiring for fall classes. The biggest losses came in the Trade, Transportation, and Utilities supersector which shed 5,381 jobs (1.7 percent). For the year, the Twin Cities metro added 30,677 jobs overall (1.7 percent), with most of the increase coming from the private sector. The only supersectors to contract were Trade, Transportation, and Utilities (down 5,925, 1.9 percent) and Information (down 273, 0.7 percent). Notable annual expansions included Educational and Health Services (up 10,542, or 3.6 percent), Leisure and Hospitality (up 6,962, 4 percent), Manufacturing (up 8,156, 4.5 percent), and Professional and Business Services (up 7,246, 2.6 percent).

## *Duluth-Superior MSA*

Employment increased in September as the metro added 923 jobs (0.7 percent). Gains among service providers (up 1,554 or 1.3 percent) overcame job losses in goods producers (down 631, 3.6 percent) for the month. Government employment led the way, with both State and Local government showing significant employment jumps (up 1,324 or 20.7 percent and 1,060 or 7.0 percent, respectively) as the fall semester got under way. On the flip side, the largest employment declines came in Leisure and Hospitality (down 645, 4.4 percent) and Mining, Logging, and Construction (down 519, 5.2 percent). Annually, Duluth employment has grown by 986 jobs (0.7 percent) with the largest increases coming in Educational and Health Services (up 679, 2.2 percent) and Mining, Logging, and Construction (387, 4.3 percent).

## *Rochester MSA*

The Rochester MSA lost jobs in September as employment ticked down by 910 jobs (0.8 percent) from August estimates. Job losses were spread across a number of supersectors, with notable examples including Trade, Transportation, and Utilities (down 193, 1.2 percent), Leisure and Hospitality (down 323, 3.3 percent), and Educational and Health Services (down 282, 0.6 percent). The Government supersector showed the largest employment increase of the month, adding 106 jobs (1.0 percent). Annually, employment is up 1,446 (1.3 percent) in Rochester, with growth in every supersector save Mining, Logging, and Construction (down 166 or 4.2 percent) and Financial Activities (down 40, 1.5 percent).

## *St. Cloud MSA*

Employment in the St. Cloud MSA continued to grow in September as the area added 540 jobs (0.5 percent) over August estimates. As was the case across the state, private sector employment dropped for the month (down 1,064 or 1.1 percent), but overall employment was buoyed by strong growth in Government employment (up 1,604, 11.8 percent) as the new school year started. For the year, St. Cloud added jobs as well, up 2,102 (2.0 percent) over September 2013. The largest annual gains came in Mining, Logging, and Construction which was up 846 (15.4 percent) while the steepest decline came in Government employment which was off by 352 (2.3 percent).

## *Mankato-North Mankato MSA*

Employment jumped sharply in September, adding 1,723 jobs (3.2 percent) after growing by less than 100 in August estimates. Both private and public sector employment grew in Mankato, up 1,000 (2.2 percent) and 723 (8.9 percent), respectively. For the year, the metro area has added 1,853 jobs (3.4 percent) with goods producers and service providers both growing.

## *Fargo-Moorhead MSA*

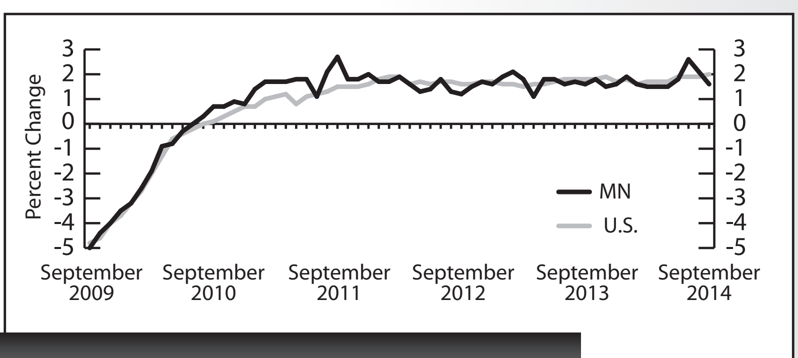
Employment was up sharply in September as the area added 2,176 jobs (1.6 percent) over August estimates. The monthly increase came thanks to the addition of 2,584 jobs (16.8 percent) in Government, as the private sector lost 408 jobs (0.3 percent) on the month. The Fargo-Moorhead metro also added jobs over the past year, with September estimates coming in at 4,060 (3.0 percent) higher than in 2013. However, the annual increase was almost entirely from growth in private sector employment. Mining, Logging, and Construction led the way with the addition of 1,854 jobs (20.9 percent) since September 2013.

## *Grand Forks-East Grand Forks MSA*

Employment was also up significantly in the Grand Forks-East Grand Forks MSA. The metro area added 2,776 jobs (5.1 percent) on the strength of an additional 2,225 Government employees (18.6 percent), primarily in the Local Government sector. Annually, metro area employment remains up only slightly, with 507 more jobs (0.9 percent) than in September 2013. Over-the-year gains in Educational and Health Services, Mining, Logging, and Construction, and Trade, Transportation, and Utilities were partially balanced by losses in the Leisure and Hospitality and the Government supersectors.

*by Nick Dobbins*

Source: Department of Employment and Economic Development, Current Employment Statistics, 2014; Bureau of Labor Statistics, U.S. Department of Labor, Current Employment Statistics, 2014.




## Total Nonfarm Jobs
**U.S. and MN over-the-year percent change**

# Employer Survey of Minnesota Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

Note: State, regional and local estimates from past months (for all tables pages 11-13) may be revised from figures previously published.

| Industry | Jobs* (Thousands) | | | Percent Change From** | | Production Workers Hours and Earnings: Average Weekly Earnings | | Average Weekly Hours | | Average Hourly Earnings | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept 2014 | Aug 2014 | Sept 2013 | Aug 2014 | Sept 2013 | Sept 2014 | Sept 2013 | Sept 2014 | Sept 2013 | Sept 2014 | Sept 2013 |
| **TOTAL NONFARM WAGE AND SALARY** | **2,849.6** | **2,851.8** | **2,804.5** | **-0.1%** | **1.6%** | — | — | — | — | — | — |
| **GOODS-PRODUCING** | **449.2** | **453.8** | **431.3** | **-1.0** | **4.1** | — | — | — | — | — | — |
| **Mining and Logging** | **7.7** | **8.0** | **7.2** | **-2.7** | **7.5** | — | — | — | — | — | — |
| **Construction** | **121.2** | **123.6** | **114.2** | **-1.9** | **6.1** | — | — | — | — | — | — |
| Specialty Trade Contractors | 76.0 | 76.8 | 70.9 | -1.0 | 7.2 | $1,116.83 | $1,232.68 | 38.3 | 41.8 | $29.16 | $29.49 |
| **Manufacturing** | **320.3** | **322.3** | **309.9** | **-0.6** | **3.3** | **841.77** | **832.97** | **41.9** | **41.9** | **20.09** | **19.88** |
| Durable Goods | 204.3 | 206.2 | 196.1 | -0.9 | 4.2 | 841.02 | 838.09 | 42.8 | 41.8 | 19.65 | 20.05 |
| Wood Product Manufacturing | 10.6 | 10.8 | 10.7 | -1.6 | -1.0 | — | — | — | — | — | — |
| Fabricated Metal Production | 43.3 | 43.4 | 41.7 | -0.3 | 3.9 | — | — | — | — | — | — |
| Machinery Manufacturing | 32.0 | 32.2 | 32.1 | -0.7 | -0.4 | — | — | — | — | — | — |
| Computer and Electronic Product | 44.6 | 45.1 | 44.6 | -1.0 | -0.1 | — | — | — | — | — | — |
| Navigational, Measuring, Electromedical and Control | 24.8 | 25.0 | 24.5 | -1.0 | 1.0 | — | — | — | — | — | — |
| Transportation Equipment | 11.9 | 12.0 | 11.2 | -0.3 | 6.7 | — | — | — | — | — | — |
| Medical Equipment and Supplies Manufacturing | 15.1 | 15.3 | 15.1 | -1.1 | -0.3 | — | — | — | — | — | — |
| Nondurable Goods | 116.0 | 116.1 | 113.8 | -0.2 | 1.9 | 843.21 | 824.88 | 40.5 | 42.0 | 20.82 | 19.64 |
| Food Manufacturing | 47.2 | 47.7 | 47.1 | -0.9 | 0.2 | — | — | — | — | — | — |
| Paper Manufacturing | 32.8 | 32.8 | 33.2 | 0.1 | -1.1 | — | — | — | — | — | — |
| Printing and Related | 23.7 | 23.6 | 23.5 | 0.2 | 0.8 | — | — | — | — | — | — |
| **SERVICE-PROVIDING** | **2,400.4** | **2,397.9** | **2,373.2** | **0.1** | **1.1** | — | — | — | — | — | — |
| **Trade, Transportation, and Utilities** | **513.4** | **518.6** | **512.3** | **-1.0** | **0.2** | — | — | — | — | — | — |
| Wholesale Trade | 131.9 | 134.4 | 130.5 | -1.9 | 1.1 | 959.62 | 1,012.74 | 39.2 | 40.3 | 24.48 | 25.13 |
| Retail Trade | 286.6 | 291.4 | 287.5 | -1.6 | -0.3 | 406.33 | 402.71 | 28.9 | 28.4 | 14.06 | 14.18 |
| Motor Vehicle and Parts | 33.8 | 34.1 | 32.4 | -0.9 | 4.4 | — | — | — | — | — | — |
| Building Material and Garden Equipment | 25.7 | 26.6 | 25.9 | -3.2 | -0.5 | — | — | — | — | — | — |
| Food and Beverage Stores | 50.9 | 52.0 | 51.6 | -2.1 | -1.5 | — | — | — | — | — | — |
| Gasoline Stations | 23.9 | 24.1 | 23.6 | -1.1 | 0.9 | — | — | — | — | — | — |
| General Merchandise Stores | 60.1 | 60.9 | 60.6 | -1.3 | -0.8 | 313.49 | 318.60 | 29.0 | 29.5 | 10.81 | 10.80 |
| Transportation,Warehouse, Utilities | 94.8 | 92.8 | 94.3 | 2.1 | 0.5 | — | — | — | — | — | — |
| Transportation and Warehousing | 81.3 | 79.5 | 81.2 | 2.2 | 0.2 | 617.90 | 592.50 | 34.5 | 35.5 | 17.91 | 16.69 |
| **Information** | **53.8** | **54.1** | **52.9** | **-0.6** | **1.6** | **763.52** | **817.60** | **33.4** | **36.5** | **22.86** | **22.40** |
| Publishing Industries | 20.6 | 20.8 | 21.3 | -0.9 | -3.2 | — | — | — | — | — | — |
| Telecommunications | 13.3 | 13.2 | 13.4 | 0.7 | -1.2 | — | — | — | — | — | — |
| **Financial Activities** | **179.2** | **181.1** | **180.9** | **-1.1** | **-1.0** | — | — | — | — | — | — |
| Finance and Insurance | 138.4 | 139.1 | 141.1 | -0.5 | -1.9 | 884.66 | 966.44 | 35.5 | 37.0 | 24.92 | 26.12 |
| Credit Intermediation | 53.2 | 53.5 | 55.0 | -0.6 | -3.2 | 718.59 | 788.07 | 34.9 | 36.2 | 20.59 | 21.77 |
| Securities, Commodity Contracts, and Other | 18.2 | 18.4 | 18.4 | -1.0 | -0.9 | — | — | — | — | — | — |
| Insurance Carriers and Related | 66.6 | 66.9 | 66.6 | -0.5 | 0.0 | — | — | — | — | — | — |
| Real Estate and Rental and Leasing | 40.8 | 41.9 | 39.8 | -2.8 | 2.4 | — | — | — | — | — | — |
| **Professional and Business Services** | **360.2** | **362.1** | **349.0** | **-0.5** | **3.2** | — | — | — | — | — | — |
| Professional, Scientific, and Technical Services | 140.2 | 140.3 | 134.6 | 0.0 | 4.2 | — | — | — | — | — | — |
| Legal Services | 18.8 | 19.0 | 18.7 | -1.1 | 0.4 | — | — | — | — | — | — |
| Accounting, Tax Preparation | 15.4 | 15.6 | 14.2 | -1.3 | 8.8 | — | — | — | — | — | — |
| Computer Systems Design | 33.1 | 33.3 | 31.9 | -0.8 | 3.5 | — | — | — | — | — | — |
| Management of Companies and Enterprises | 79.3 | 79.9 | 76.9 | -0.7 | 3.2 | — | — | — | — | — | — |
| Administrative and Support Services | 140.6 | 141.9 | 137.5 | -0.9 | 2.3 | — | — | — | — | — | — |
| **Educational and Health Services** | **500.0** | **494.8** | **492.0** | **1.0** | **1.6** | — | — | — | — | — | — |
| Educational Services | 66.9 | 59.2 | 66.1 | 13.1 | 1.3 | — | — | — | — | — | — |
| Health Care and Social Assistance | 433.1 | 435.6 | 425.9 | -0.6 | 1.7 | — | — | — | — | — | — |
| Ambulatory Health Care | 141.5 | 142.8 | 136.7 | -0.9 | 3.5 | 1,220.45 | 1,210.65 | 34.9 | 34.6 | 34.97 | 34.99 |
| Offices of Physicians | 67.4 | 67.8 | 66.2 | -0.6 | 1.7 | — | — | — | — | — | — |
| Hospitals | 104.3 | 104.9 | 104.8 | -0.6 | -0.5 | — | — | — | — | — | — |
| Nursing and Residential Care Facilities | 105.4 | 106.7 | 105.4 | -1.2 | 0.1 | 438.06 | 437.90 | 29.4 | 30.2 | 14.90 | 14.50 |
| Social Assistance | 81.8 | 81.2 | 79.0 | 0.8 | 3.6 | — | — | — | — | — | — |
| **Leisure and Hospitality** | **264.1** | **272.8** | **259.2** | **-3.2** | **1.9** | — | — | — | — | — | — |
| Arts, Entertainment, and Recreation | 41.9 | 47.1 | 42.5 | -11.0 | -1.4 | — | — | — | — | — | — |
| Accommodation and Food Services | 222.2 | 225.8 | 216.7 | -1.6 | 2.5 | — | — | — | — | — | — |
| Food Services and Drinking Places | 194.5 | 195.4 | 187.7 | -0.5 | 3.6 | 253.41 | 247.95 | 21.1 | 22.5 | 12.01 | 11.02 |
| **Other Services** | **118.9** | **117.6** | **118.2** | **1.1** | **0.6** | — | — | — | — | — | — |
| Religious, Grantmaking, Civic, Professional Organizations | 69.6 | 68.5 | 69.0 | 1.6 | 0.9 | | | | | | |
| **Government** | **411.0** | **396.8** | **408.7** | **3.6** | **0.6** | | | | | | |
| Federal Government | 31.2 | 31.3 | 31.4 | -0.4 | -0.5 | | | | | | |
| State Government | 101.9 | 90.9 | 104.3 | 12.1 | -2.3 | | | | | | |
| State Government Education | 60.6 | 51.9 | 63.7 | 16.9 | -4.7 | | | | | | |
| Local Government | 278.0 | 274.6 | 273.1 | 1.2 | 1.8 | | | | | | |
| Local Government Education | 131.9 | 114.6 | 126.6 | 15.1 | 4.2 | | | | | | |

Note: Not all industry subgroups are shown for every major industry category.

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2014.

# Employer Survey of Twin Cities Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

Note: State, regional and local estimates from past months (for all tables pages 11-13) may be revised from figures previously published.

| Industry | Jobs* (Thousands) | | | Percent Change From** | | Production Workers Hours and Earnings | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Average Weekly Earnings | | Average Weekly Hours | | Average Hourly Earnings | |
| | Sept 2014 | Aug 2014 | Sept 2013 | Aug 2014 | Sept 2013 | Sept 2014 | Sept 2013 | Sept 2014 | Sept 2013 | Sept 2014 | Sept 2013 |
| **TOTAL NONFARM WAGE AND SALARY** | **1,843.0** | **1,841.6** | **1,812.3** | **0.1%** | **1.7%** | — | — | — | — | — | — |
| **GOODS-PRODUCING** | **260.8** | **262.3** | **252.5** | **-0.6** | **3.3** | — | — | — | — | — | — |
| **Mining, Logging, and Construction** | **69.7** | **70.3** | **69.6** | **-0.8** | **0.1** | — | — | — | — | — | — |
| Construction of Buildings | 16.1 | 16.3 | 14.9 | -1.5 | 8.1 | — | — | — | — | — | — |
| Specialty Trade Contractors | 47.0 | 47.8 | 45.9 | -1.5 | 2.6 | $1,245.75 | $1,309.59 | 38.7 | 41.8 | $32.19 | $31.33 |
| **Manufacturing** | **191.1** | **192.0** | **182.9** | **-0.5** | **4.5** | **886.08** | **842.54** | **42.6** | **40.9** | **20.80** | **20.60** |
| Durable Goods | 131.8 | 132.8 | 125.4 | -0.8 | 5.1 | 863.01 | 867.36 | 43.0 | 41.6 | 20.07 | 20.85 |
| Fabricated Metal Production | 28.6 | 28.7 | 28.1 | -0.3 | 1.8 | — | — | — | — | — | — |
| Machinery Manufacturing | 19.5 | 19.8 | 19.6 | -1.7 | -0.3 | — | — | — | — | — | — |
| Computer and Electronic Product | 35.5 | 35.8 | 35.3 | -0.9 | 0.5 | — | — | — | — | — | — |
| Navigational, Measuring, Electromedical and Control | 23.4 | 23.6 | 23.0 | -0.9 | 1.8 | — | — | — | — | — | — |
| Medical Equipment and Supplies Manufacturing | 13.9 | 14.0 | 14.0 | -0.8 | -0.9 | — | — | — | — | — | — |
| Nondurable Goods | 59.3 | 59.1 | 57.5 | 0.3 | 3.2 | 935.21 | 795.14 | 41.9 | 39.5 | 22.32 | 20.13 |
| Food Manufacturing | 13.6 | 13.7 | 13.4 | -0.8 | 1.4 | — | — | — | — | — | — |
| Printing and Related | 15.2 | 15.1 | 15.0 | 0.4 | 1.4 | — | — | — | — | — | — |
| **SERVICE-PROVIDING** | **1,582.2** | **1,579.4** | **1,559.8** | **0.2** | **1.4** | — | — | — | — | — | — |
| **Trade, Transportation, and Utilities** | **313.8** | **319.2** | **319.7** | **-1.7** | **-1.9** | — | — | — | — | — | — |
| Wholesale Trade | 80.4 | 81.3 | 81.7 | -1.1 | -1.6 | 937.10 | 1,003.70 | 38.9 | 40.1 | 24.09 | 25.03 |
| Merchant Wholesalers - Durable Goods | 43.8 | 44.5 | 43.3 | -1.6 | 1.1 | — | — | — | — | — | — |
| Merchant Wholesalers - Nondurable Goods | 24.6 | 25.0 | 24.5 | -1.6 | 0.4 | — | — | — | — | — | — |
| Retail Trade | 172.3 | 176.4 | 175.3 | -2.3 | -1.7 | 434.40 | 391.97 | 30.0 | 28.8 | 14.48 | 13.61 |
| Food and Beverage Stores | 28.8 | 29.6 | 29.5 | -2.8 | -2.3 | — | — | — | — | — | — |
| General Merchandise Stores | 37.2 | 37.8 | 37.2 | -1.8 | 0.0 | 319.03 | 333.54 | 29.9 | 30.6 | 10.67 | 10.90 |
| Transportation, Warehouse, Utilities | 61.1 | 61.5 | 62.7 | -0.6 | -2.6 | — | — | — | — | — | — |
| Utilities | 7.7 | 7.7 | 7.7 | 0.5 | 0.4 | — | — | — | — | — | — |
| Transportation and Warehousing | 53.4 | 53.8 | 55.0 | -0.8 | -3.0 | 775.06 | 779.96 | 40.9 | 43.5 | 18.95 | 17.93 |
| **Information** | **38.3** | **38.6** | **38.5** | **-0.9** | **-0.7** | | | | | | |
| Publishing Industries | 16.4 | 16.5 | 16.7 | -0.9 | -1.9 | — | — | — | — | — | — |
| Telecommunications | 9.5 | 9.4 | 9.5 | 1.1 | -0.6 | — | — | — | — | — | — |
| **Financial Activities** | **141.7** | **143.9** | **141.3** | **-1.5** | **0.3** | — | — | — | — | — | — |
| Finance and Insurance | 108.4 | 109.8 | 108.8 | -1.3 | -0.4 | 950.45 | 1,118.63 | 34.3 | 37.4 | 27.71 | 29.91 |
| Credit Intermediation | 37.0 | 37.5 | 38.4 | -1.2 | -3.5 | — | — | — | — | — | — |
| Securities, Commodity Contracts, and Other | 16.6 | 16.7 | 16.3 | -0.7 | 1.8 | — | — | — | — | — | — |
| Insurance Carriers and Related | 53.7 | 54.2 | 53.1 | -1.0 | 1.0 | — | — | — | — | — | — |
| Real Estate and Rental and Leasing | 33.3 | 34.2 | 32.4 | -2.4 | 2.9 | — | — | — | — | — | — |
| **Professional and Business Services** | **285.1** | **286.8** | **277.9** | **-0.6** | **2.6** | — | — | — | — | — | — |
| Professional, Scientific, and Technical Services | 109.8 | 110.7 | 106.9 | -0.8 | 2.7 | — | — | — | — | — | — |
| Legal Services | 15.8 | 15.9 | 15.7 | -1.2 | 0.4 | — | — | — | — | — | — |
| Architectural, Engineering, and Related | 16.1 | 16.5 | 15.6 | -2.4 | 3.2 | — | — | — | — | — | — |
| Computer Systems Design | 27.2 | 27.3 | 26.2 | -0.3 | 3.8 | — | — | — | — | — | — |
| Management of Companies and Enterprises | 71.0 | 71.5 | 69.1 | -0.7 | 2.8 | — | — | — | — | — | — |
| Administrative and Support Services | 104.3 | 104.5 | 101.9 | -0.2 | 2.4 | — | — | — | — | — | — |
| Employment Services | 48.9 | 47.8 | 49.7 | 2.2 | -1.6 | — | — | — | — | — | — |
| **Educational and Health Services** | **306.7** | **302.1** | **296.2** | **1.5** | **3.6** | — | — | — | — | — | — |
| Educational Services | 44.1 | 39.2 | 42.7 | 12.5 | 3.3 | — | — | — | — | — | — |
| Health Care and Social Assistance | 262.6 | 262.9 | 253.4 | -0.1 | 3.6 | — | — | — | — | — | — |
| Ambulatory Health Care | 84.7 | 85.2 | 81.6 | -0.7 | 3.7 | — | — | — | — | — | — |
| Hospitals | 61.4 | 61.4 | 61.0 | 0.0 | 0.7 | — | — | — | — | — | — |
| Nursing and Residential Care Facilities | 57.9 | 58.1 | 56.2 | -0.5 | 3.0 | — | — | — | — | — | — |
| Social Assistance | 58.6 | 58.1 | 54.7 | 0.9 | 7.2 | — | — | — | — | — | — |
| **Leisure and Hospitality** | **179.6** | **183.2** | **172.6** | **-2.0** | **4.0** | — | — | — | — | — | — |
| Arts, Entertainment, and Recreation | 32.2 | 35.5 | 32.0 | -9.4 | 0.6 | — | — | — | — | — | — |
| Accommodation and Food Services | 147.4 | 147.7 | 140.7 | -0.2 | 4.8 | 278.30 | 272.11 | 22.3 | 23.6 | 12.48 | 11.53 |
| Food Services and Drinking Places | 134.3 | 134.2 | 126.9 | 0.1 | 5.8 | 268.36 | 263.12 | 21.4 | 23.0 | 12.54 | 11.44 |
| **Other Services** | **77.7** | **77.2** | **78.0** | **0.6** | **-0.4** | — | — | — | — | — | — |
| Repair and Maintenance | 13.3 | 13.2 | 13.4 | 0.7 | -1.0 | — | — | — | — | — | — |
| Religious, Grantmaking, Civic, Professional Organizations | 43.3 | 43.4 | 43.2 | -0.3 | 0.3 | — | — | — | — | — | — |
| **Government** | **239.3** | **228.3** | **235.6** | **4.8** | **1.6** | | | | | | |
| Federal Government | 19.8 | 19.8 | 20.1 | -0.4 | -1.5 | | | | | | |
| State Government | 72.2 | 62.7 | 70.4 | 15.2 | 2.6 | | | | | | |
| State Government Education | 44.0 | 36.7 | 42.5 | 19.7 | 3.4 | | | | | | |
| Local Government | 147.3 | 145.8 | 145.2 | 1.0 | 1.5 | | | | | | |
| Local Government Education | 82.0 | 69.6 | 78.5 | 17.7 | 4.4 | | | | | | |

Note: Not all industry subgroups are shown for every major industry category.

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2014.

# Employer Survey

| Industry | Duluth-Superior MSA Jobs Sept 2014 | Jobs Aug 2014 | Jobs Sept 2013 | % Chg. From Aug 2014 | % Chg. From Sept 2013 | Rochester MSA Jobs Sept 2014 | Jobs Aug 2014 | Jobs Sept 2013 | % Chg. From Aug 2014 | % Chg. From Sept 2013 |
|---|---|---|---|---|---|---|---|---|---|---|
| **TOTAL NONFARM WAGE AND SALARY** | **134,274** | **133,351** | **133,288** | **0.7%** | **0.7%** | **109,250** | **110,160** | **107,804** | **-0.8%** | **1.3%** |
| **GOODS-PRODUCING** | **16,822** | **17,453** | **16,479** | **-3.6** | **2.1** | **14,496** | **14,652** | **14,267** | **-1.1** | **1.6** |
| Mining, Logging, and Construction | 9,368 | 9,887 | 8,981 | -5.2 | 4.3 | 3,758 | 3,800 | 3,924 | -1.1 | -4.2 |
| Manufacturing | 7,454 | 7,566 | 7,498 | -1.5 | -0.6 | 10,738 | 10,852 | 10,343 | -1.1 | 3.8 |
| **SERVICE-PROVIDING** | **117,452** | **115,898** | **116,809** | **1.3** | **0.6** | **94,754** | **95,508** | **93,537** | **-0.8** | **1.3** |
| Trade, Transportation, and Utilities | 24,417 | 24,770 | 24,283 | -1.4 | 0.6 | 16,549 | 16,742 | 16,227 | -1.2 | 2.0 |
| Wholesale Trade | 3,162 | 3,183 | 3,119 | -0.7 | 1.4 | 2,266 | 2,345 | 2,276 | -3.4 | -0.4 |
| Retail Trade | 15,402 | 15,723 | 15,293 | -2.0 | 0.7 | 11,859 | 12,097 | 11,566 | -2.0 | 2.5 |
| Transportation, Warehouse, Utilities | 5,853 | 5,864 | 5,871 | -0.2 | -0.3 | 2,424 | 2,300 | 2,385 | 5.4 | 1.6 |
| Information | 1,456 | 1,475 | 1,429 | -1.3 | 1.9 | 1,761 | 1,799 | 1,691 | -2.1 | 4.1 |
| Financial Activities | 5,441 | 5,506 | 5,508 | -1.2 | -1.2 | 2,586 | 2,613 | 2,626 | -1.0 | -1.5 |
| Professional and Business Services | 7,841 | 7,936 | 7,823 | -1.2 | 0.2 | 5,711 | 5,677 | 5,488 | 0.6 | 4.1 |
| Educational and Health Services | 31,827 | 31,576 | 31,148 | 0.8 | 2.2 | 43,867 | 44,149 | 43,705 | -0.6 | 0.4 |
| Leisure and Hospitality | 14,103 | 14,748 | 14,438 | -4.4 | -2.3 | 9,592 | 9,915 | 9,394 | -3.3 | 2.1 |
| Other Services | 6,686 | 6,572 | 6,367 | 1.7 | 5.0 | 3,857 | 3,888 | 3,714 | -0.8 | 3.9 |
| Government | 25,681 | 23,315 | 25,813 | 10.1 | -0.5 | 10,831 | 10,725 | 10,692 | 1.0 | 1.3 |

# Employer Survey

| Industry | St. Cloud MSA Jobs Sept 2014 | Jobs Aug 2014 | Jobs Sept 2013 | % Chg. From Aug 2014 | % Chg. From Sept 2013 | Mankato-North Mankato MSA Jobs Sept 2014 | Jobs Aug 2014 | Jobs Sept 2013 | % Chg. From Aug 2014 | % Chg. From Sept 2013 |
|---|---|---|---|---|---|---|---|---|---|---|
| **TOTAL NONFARM WAGE AND SALARY** | **106,714** | **106,174** | **104,612** | **0.5%** | **2.0%** | **56,210** | **54,487** | **54,357** | **3.2** | **3.4%** |
| **GOODS-PRODUCING** | **21,674** | **21,967** | **20,725** | **-1.3** | **4.6** | **10,407** | **10,263** | **10,039** | **1.4** | **3.7** |
| Mining, Logging, and Construction | 6,342 | 6,499 | 5,496 | -2.4 | 15.4 | -- | -- | -- | -- | -- |
| Manufacturing | 15,332 | 15,468 | 15,229 | -0.9 | 0.7 | -- | -- | -- | -- | -- |
| | | | | | | -- | -- | -- | -- | -- |
| **SERVICE-PROVIDING** | **85,040** | **84,207** | **83,887** | **1.0** | **1.4** | **45,803** | **44,224** | **44,318** | **3.6** | **3.4** |
| Trade, Transportation, and Utilities | 20,955 | 21,024 | 20,791 | -0.3 | 0.8 | -- | -- | -- | -- | -- |
| Wholesale Trade | 4,285 | 4,297 | 4,182 | -0.3 | 2.5 | -- | -- | -- | -- | -- |
| Retail Trade | 13,217 | 13,235 | 13,142 | -0.1 | 0.6 | -- | -- | -- | -- | -- |
| Transportation, Warehouse, Utilities | 3,453 | 3,492 | 3,467 | -1.1 | -0.4 | -- | -- | -- | -- | -- |
| Information | 1,633 | 1,634 | 1,710 | -0.1 | -4.5 | -- | -- | -- | -- | -- |
| Financial Activities | 4,539 | 4,569 | 4,541 | -0.7 | 0.0 | -- | -- | -- | -- | -- |
| Professional and Business Services | 9,186 | 9,500 | 8,830 | -3.3 | 4.0 | -- | -- | -- | -- | -- |
| Educational and Health Services | 20,326 | 20,841 | 19,930 | -2.5 | 2.0 | -- | -- | -- | -- | -- |
| Leisure and Hospitality | 9,750 | 9,508 | 9,078 | 2.5 | 7.4 | -- | -- | -- | -- | -- |
| Other Services | 3,505 | 3,589 | 3,509 | -2.3 | -0.1 | -- | -- | -- | -- | -- |
| Government | 15,146 | 13,542 | 15,498 | 11.8 | -2.3 | 8,869 | 8,146 | 8,689 | 8.9 | 2.1 |

# Employer Survey

| Industry | Fargo-Moorhead MSA Jobs Sept 2014 | Jobs Aug 2014 | Jobs Sept 2013 | % Chg. From Aug 2014 | % Chg. From Sept 2013 | Grand Forks-East Grand Forks MSA Jobs Sept 2014 | Jobs Aug 2014 | Jobs Sept 2013 | % Chg. From Aug 2014 | % Chg. From Sept 2013 |
|---|---|---|---|---|---|---|---|---|---|---|
| **TOTAL NONFARM WAGE AND SALARY** | **138,544** | **136,368** | **134,484** | **1.6%** | **3.0%** | **57,103** | **54,327** | **56,596** | **5.1%** | **0.9%** |
| **GOODS-PRODUCING** | **20,969** | **21,175** | **19,059** | **-1.0** | **10.0** | **7,505** | **7,192** | **7,189** | **4.4** | **4.4** |
| Mining, Logging, and Construction | 10,723 | 10,988 | 8,869 | -2.4 | 20.9 | 3,770 | 3,753 | 3,507 | 0.5 | 7.5 |
| Manufacturing | 10,246 | 10,187 | 10,190 | 0.6 | 0.6 | 3,735 | 3,439 | 3,682 | 8.6 | 1.4 |
| **SERVICE-PROVIDING** | **117,575** | **115,193** | **115,425** | **2.1** | **1.9** | **49,598** | **47,135** | **49,407** | **5.2** | **0.4** |
| Trade, Transportation, and Utilities | 29,426 | 29,343 | 29,113 | 0.3 | 1.1 | 12,288 | 12,213 | 12,134 | 0.6 | 1.3 |
| Wholesale Trade | 9,334 | 9,355 | 8,911 | -0.2 | 4.8 | 2,013 | 2,047 | 1,978 | -1.7 | 1.8 |
| Retail Trade | 15,054 | 15,056 | 15,377 | 0.0 | -2.1 | 8,397 | 8,238 | 8,120 | 1.9 | 3.4 |
| Transportation, Warehouse, Utilities | 5,038 | 4,932 | 4,825 | 2.2 | 4.4 | 1,878 | 1,928 | 2,036 | -2.6 | -7.8 |
| Information | 3,327 | 3,328 | 3,283 | 0.0 | 1.3 | 620 | 626 | 607 | -1.0 | 2.1 |
| Financial Activities | 10,015 | 10,134 | 9,802 | -1.2 | 2.2 | 1,727 | 1,733 | 1,728 | -0.4 | -0.1 |
| Professional and Business Services | 16,044 | 16,408 | 15,778 | -2.2 | 1.7 | 2,951 | 2,802 | 2,906 | 5.3 | 1.6 |
| Educational and Health Services | 21,840 | 21,686 | 21,307 | 0.7 | 2.5 | 9,930 | 9,882 | 9,663 | 0.5 | 2.8 |
| Leisure and Hospitality | 13,862 | 13,882 | 13,353 | -0.1 | 3.8 | 5,908 | 5,915 | 6,037 | -0.1 | -2.1 |
| Other Services | 5,132 | 5,067 | 5,152 | 1.3 | -0.4 | 1,958 | 1,973 | 2,003 | -0.8 | -2.3 |
| Government | 17,929 | 15,345 | 17,637 | 16.8 | 1.7 | 14,216 | 11,991 | 14,329 | 18.6 | -0.8 |

Source: Department of Employment and Economic Development, Current Employment Statistics, and North Dakota Job Service, 2014.

# Minnesota Economic Indicators

## Highlights

The **Minnesota Index** increased 0.4 percent for the fourth consecutive month in September, indicating that Minnesota's economy has shifted into high gear. The index hasn't been this high for as many consecutive months since late 1999 into early 2000. Job growth was strong for the second month in a row, and the unemployment rate declined by 0.2 points for the second straight month. The only negative: Average weekly manufacturing hours tailed off. The pace of economic growth has doubled since earlier in the year, and if the current pace continues through the rest of 2014, Minnesota's GDP will top 3 percent for the first time since 2010.

Minnesota's index in September was up 3.6 percent from a year ago compared to the U.S. index, which was 3.2 percent higher than a year ago. The last time Minnesota's index was 3.6 percent higher over the year was August 2000. Minnesota's index has been outpacing the U.S. index over the last three months. Both indices are real-time monthly proxies for GDP growth and are subject to significant revisions as preliminary data are revised.

Adjusted **Wage and Salary Employment** climbed strongly for the second straight month with 7,200 jobs added in September to go with the revised 8,800 jobs added in August. The combined two-month gain is the largest two-month gain since last October and November. The uptick in hiring over the last two months is a welcome development as job growth was weak during the first half of the year. All of the job growth was in the private sector which added 11,400 jobs; the public sector cut 4,100 jobs. September's private sector job jump was the 10th highest monthly gain over the last 24 years. Professional and Business Services added the most jobs with solid job additions also in Leisure and Hospitality, Other Services, Educational and Health Services, and Manufacturing.

Minnesota job growth over the year, using unadjusted job numbers, slipped to 1.6 percent, well below the 2.0 percent annual increase recorded nationally. Minnesota's average over-the-year gain through September, however, is 1.8 percent as is the national average.

Minnesota's adjusted online **Help-Wanted Ads** lost ground in September, slipping 4.4 percent. However, September's 120,000 ads are the fourth highest on record, suggesting that labor demand remains strong by this measure. Online help-wanted ads also dipped nationally, falling by 2.6 percent. The state's share of online job advertising was 2.4 percent in September, well above the state's 2.0 percent share of the nation's wage and salary employment.

Minnesota's **Purchasing Managers' Index (PMI)** inched down to a still very solid 66.3 in September. Minnesota's PMI has been above 60 for eight straight months. That is the longest streak of consecutive months of 60-plus, beating out a seven-month, 60-plus span during the first half of 2010. Manufacturing employment is up by more than 3 percent over the last three months which is the best over-the-year growth since early 2011.

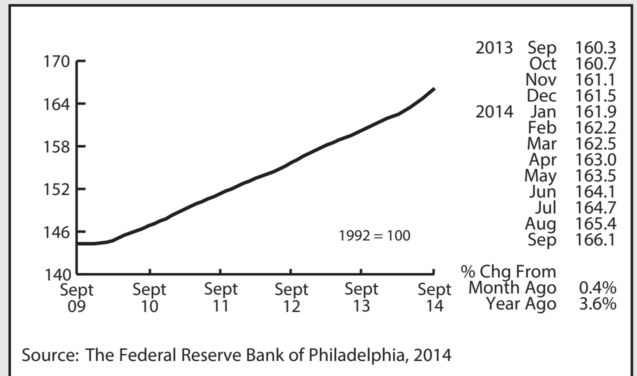
Adjusted **Manufacturing Hours** fell to 41.5 hours in September which was the shortest workweek since April. Despite the decline, the factory workweek remains high and, if there is no further decline, 2014's annual average weekly manufacturing hours will finish among the highest on record. **Manufacturing Earnings** slipped from the second-highest total in August to $832.87 in September. Factory paychecks are still on pace to be 1.3 percent higher, roughly $550, in real terms for 2014 than 2013.

The **Minnesota Leading Index** dropped in September but remains elevated by historical standards. The index hasn't been this strong since the last half of 1999. The index, which predicts Minnesota's GDP expansion six months out, is signaling that the state's economy will be growing at a 4 percent annual rate through next March. Minnesota's leading index has been running substantially higher than the U.S. index since April. The index, however, gets revised as updated data come in, so expectations should be held in check.

After plunging in July, adjusted **Residential Building Permits** zigzagged down in September, adding to this year's disappointing home-building market. Home building has not been as strong as expected despite the continual improvement in the state's economy.

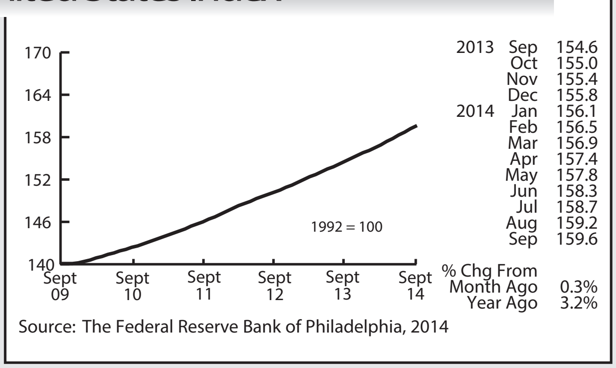
Adjusted **Initial Claims for Unemployment Benefits (UB)** rose for the second straight month in September but were down 6.9 percent from a year ago (unadjusted basis). Layoff levels remain low, suggesting that job growth will remain steady through the rest of the year.

*by Dave Senf*




### Minnesota Index

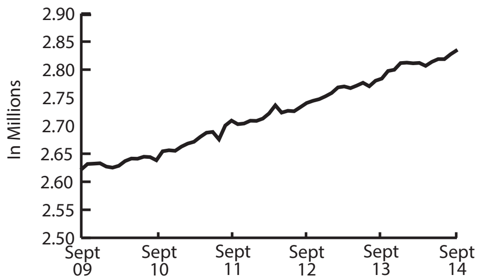
### United States Index




Note: All data except for Minnesota's PMI have been seasonally adjusted. See the feature article in the Minnesota Employment Review, May 2010, for more information on the Minnesota Index.

# Minnesota Economic Indicators

## Wage and Salary Employment




seasonally adjusted

| | | |
|---|---|---|
| 2014 | Apr | 2.8067 |
| | May | 2.8139 |
| | Jun | 2.8188 |
| | Jul | 2.8187 |
| | Aug | 2.8275 |
| | Sep | 2.8347 |

% Chg From Month Ago 0.3%

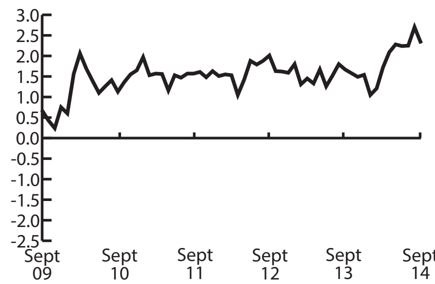
unadjusted

| | | |
|---|---|---|
| 2013 | Sep | 2.8045 |
| 2014 | Sep | 2.8490 |

% Chg From Year Ago 1.6%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2014

## Minnesota Leading Index

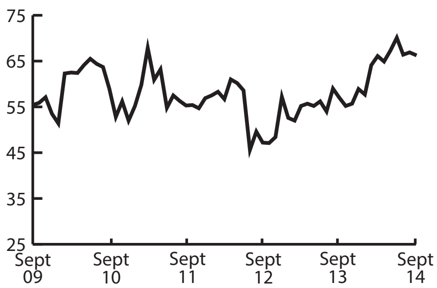



| | | |
|---|---|---|
| 2013 | Sep | 1.67 |
| | Oct | 1.58 |
| | Nov | 1.49 |
| | Dec | 1.54 |
| 2014 | Jan | 1.05 |
| | Feb | 1.21 |
| | Mar | 1.72 |
| | Apr | 2.09 |
| | May | 2.28 |
| | Jun | 2.24 |
| | Jul | 2.25 |
| | Aug | 2.70 |
| | Sep | 2.32 |

% Chg From Month Ago -14.1%
Year Ago 38.7%

Source: The Federal Reserve Bank of Philadelphia, 2014

## Purchasing Managers' Index

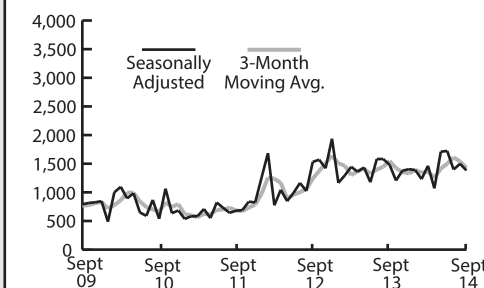



| | | |
|---|---|---|
| 2013 | Sep | 57.0 |
| | Oct | 55.2 |
| | Nov | 55.7 |
| | Dec | 58.9 |
| 2014 | Jan | 57.7 |
| | Feb | 64.1 |
| | Mar | 66.1 |
| | Apr | 64.9 |
| | May | 67.3 |
| | Jun | 70.1 |
| | Jul | 66.4 |
| | Aug | 66.9 |
| | Sep | 66.3 |

% Chg From Month Ago -0.9%
Year Ago 16.3%

Source: Creighton University, Mid-America Survey of Business Conditions, 2014

## Residential Building Permits




seasonally adjusted

| | | |
|---|---|---|
| 2014 | Apr | 1,069 |
| | May | 1,709 |
| | Jun | 1,723 |
| | Jul | 1,399 |
| | Aug | 1,499 |
| | Sep | 1,383 |

% Chg From Month Ago -7.7%

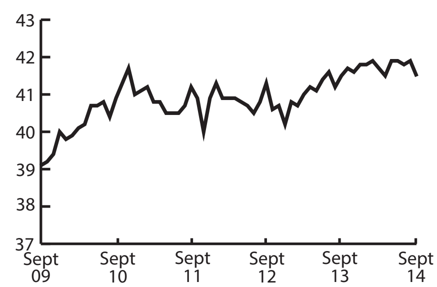
unadjusted

| | | |
|---|---|---|
| 2013 | Sep | 2,012 |
| 2014 | Sep | 2,042 |

% Chg From Year Ago 1.5%

Source: Residential Building Permits, Census Bureau, U.S. Department of Commerce, 2014

## Average Weekly Manufacturing Hours




seasonally adjusted

| | | |
|---|---|---|
| 2014 | Apr | 41.5 |
| | May | 41.9 |
| | Jun | 41.9 |
| | Jul | 41.8 |
| | Aug | 41.9 |
| | Sep | 41.5 |

% Chg From Month Ago -1.0%

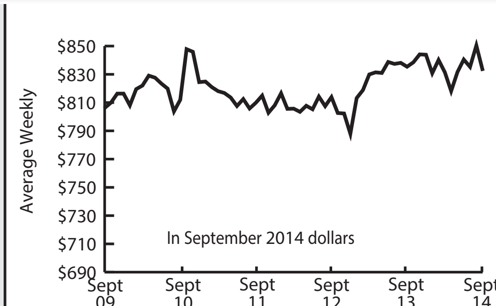
unadjusted

| | | |
|---|---|---|
| 2013 | Sep | 41.9 |
| 2014 | Sep | 41.9 |

% Chg From Year Ago 0.0%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2014

## Manufacturing Earnings




seasonally adjusted

| | | |
|---|---|---|
| 2014 | Apr | 818.15 |
| | May | 831.59 |
| | Jun | 840.48 |
| | Jul | 835.27 |
| | Aug | 850.43 |
| | Sep | 832.87 |

% Chg From Month Ago -2.1%

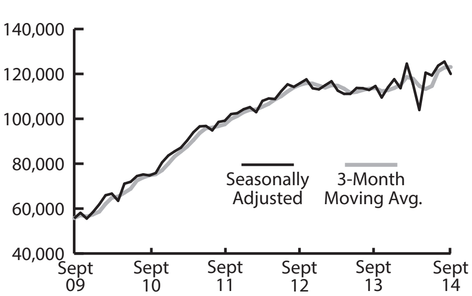
unadjusted

| | | |
|---|---|---|
| 2013 | Sep | 832.97 |
| 2014 | Sep | 841.80 |

% Chg From Year Ago 1.1%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2014

## Online Help-Wanted Advertising

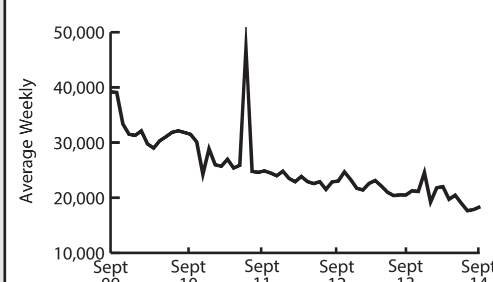



| | | |
|---|---|---|
| 2013 | Sep | 114,612 |
| | Oct | 109,484 |
| | Nov | 114,022 |
| | Dec | 117,625 |
| 2014 | Jan | 113,634 |
| | Feb | 124,579 |
| | Mar | 115,353 |
| | Apr | 103,945 |
| | May | 120,561 |
| | Jun | 119,300 |
| | Jul | 123,700 |
| | Aug | 125,500 |
| | Sep | 120,000 |

% Chg From Month Ago -4.4%
Year Ago 4.7%

Source: The Conference Board Inc., 2014

## Initial UB Claimants




seasonally adjusted

| | | |
|---|---|---|
| 2014 | Apr | 19,720 |
| | May | 20,461 |
| | Jun | 18,991 |
| | Jul | 17,639 |
| | Aug | 17,864 |
| | Sep | 18,336 |

% Chg From Month Ago 2.6%

unadjusted

| | | |
|---|---|---|
| 2013 | Sep | 14,779 |
| 2014 | Sep | 13,757 |

% Chg From Year Ago -6.9%

Source: Department of Employment and Economic Development, Unemployment Insurance Program, 2014

Minnesota Employment Review

**DEED**
**Labor Market Information Office**
1st National Bank Building
332 Minnesota Street, Suite E200
St. Paul, MN 55101-1351
651.259.7400 (voice)
1.888.234.1114 (toll free)
651.296.3900 (TTY)
1.800.657.3973 (TTY toll free)
e-mail :
DEED.lmi@state.mn.us
Internet :
mn.gov/deed/lmi

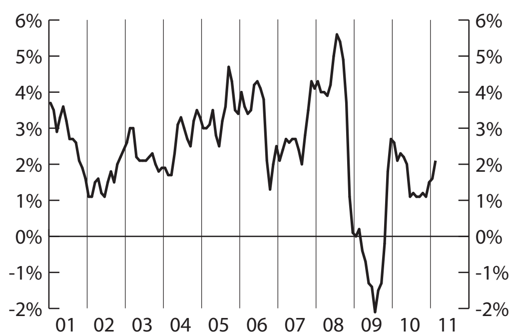
**Labor Market Information Help Line:**
651.259.7384





## U.S. Consumer Price Index for All Urban Consumers (CPI-U)

Percent Change From One Year Ago




The CPI-U increased 0.1 percent in September on a seasonally adjusted basis, the BLS reported. Along with the shelter index, the index for medical care increased, and the indices for alcoholic beverages and for personal care advanced slightly. Indices for airline fares and for used cars and trucks declined.

Over the last 12 months the all items index increased 1.7 percent as increases in shelter and food indices outweighed declines in energy indices. The food index rose 0.3 percent as five of the six major grocery store food group indices increased. The energy index declined 0.7 percent. The 12-month change in the index for all items less food and energy remained at 1.7 percent.

For more information on the U.S. CPI or the semi-annual Minneapolis-St. Paul CPI, call: 651.259.7384 or toll free 1.888.234.1114.

The employment and unemployment data in this publication were produced in cooperation with the Bureau of Labor Statistics, U.S. Department of Labor.




## What's Going On?

### SSB offers podcasts for job seekers

State Services for the Blind's Communication Center offers several career podcasts full of helpful advice and insights for job seekers and workers trying to advance their careers. Local, regional and national experts speak on a variety of employment-related issues and trends, such as five phrases never to use on a resume, where the jobs are, and how much time you should spend on a job search.

Transcripts are included with each podcast.

Here is more:
**http://tinyurl.com/knua9yt**

Minnesota Department of Employment and Economic Development

# Disability Employment in Minnesota

*This article on disability employment in Minnesota, the final in a series, is based on 2012 American Community Survey (ACS) data. The ACS replaced the Decennial Census long form in 2005. The report will discuss four major characteristics of disability employment in Minnesota in 2012: Disability prevalence, employment rate, full-time/full-year employment, and poverty.*

## Legislative Work on Disability Employment

At the national level Executive Order 13548 directs the federal government, as the largest employer in the nation, to become a role model for the employment of individuals with disabilities. This is in support of Executive Order 13163, which directs the federal government to adopt a goal of hiring 100,000 individuals with disabilities within five years. In March 2014 the U.S. Department of Labor announced changes in regulations for implementing Section 503 of the Rehabilitation Act. Section 503 now includes a rule to ensure that contractors doing business with the federal government reserve 7 percent of their jobs for people with disabilities.

At the state level Executive Order 14-14 directs all state agencies to increase employment of people with disabilities to at least 7 percent by August 2018. This directive was driven by reports showing that, although Minnesota maintains one of the highest rates of disability employment in the nation, the number of state employees with disabilities had declined since 1999. The executive order followed the Reform 2020 budget package which invests about $400,000 in a two-year plan (2012–2014) to support 18-to 26-year-old Minnesotans with disabilities in having access to employment.

Photo: courtesy SSB

Table 1

**Disability Prevalence**

| Area | 2011 Percent with Disabilities | 2012 Percent with Disabilities | Percent Change |
|---|---|---|---|
| U.S. | 12.1% | 12.1% | 0.0% |
| Minnesota | 9.9% | 10.3% | 0.4% |

**Disability Prevalence in Working Age Cohort**

| Area | 2011 Percent with Disabilities | 2012 Percent with Disabilities | Percent Change |
|---|---|---|---|
| U.S. | 10.5% | 10.4% | -0.1% |
| Minnesota | 7.9% | 8.5% | 0.6% |

*Source: ACS Data*

Photo: courtesy SSB

## Disability Prevalence

According to the American Community Survey (ACS) definitions, disability status covers six major categories: Ambulatory Disability, Cognitive Disability, Hearing Disability, Independent Living Disability, Self-Care Disability, and Visual Disability.

Table 1 shows that in 2012 about 10.3 percent of the entire non-institutionalized population in Minnesota reported a disability, increasing from 9.9 percent in 2011, while the national prevalence rate remained the same as it was in 2011 at 12.1 percent. The 5,322,800 population of non-institutionalized people living in Minnesota included 548,248 people with disabilities, about one in 10. Their prevalence in the working-age group, ages 21–64, increased to 8.5 percent in Minnesota and 10.4 percent at the national level. Thus, the 2012 disability prevalence rate in Minnesota increased by 0.6 percent from 2011 while the national rate decreased by about 0.1 percent.

## Workforce Participation and Employment Rate as of 2012

As shown in Table 2, the 2012 ACS data indicate that the share of working-age people with disabilities participating in the workforce in the U.S.

increased slightly from 33.4 percent in 2011 to 33.5 percent in 2012. Of the 18,890,100 total, non-institutionalized, working age people with disabilities in the United States, 6,328,000 were employed. Minnesota employment for the total number of people with disabilities showed a significant decrease of 5 percent from 2011 to 2012 and 42.7 percent from 47.7 percent, while employment for the total number of Minnesotans without disabilities increased from 81.8 percent in 2011 to 83.4 in 2012. The 5 percent decline of employment among people with disabilities may point to a 'last-in/first-out' protocol. Another disappointing indicator from the 2012 data is that Minnesota fell from second to fifth place in the rate of disability employment among states.

Table 2

**Workforce Participation**
**Percent of Total Population Employed**

| Area | 2011 | 2012 | Percent Change |
|---|---|---|---|
| U.S. | 71.2% | 71.8% | 0.6% |
| Minnesota | 79.1% | 79.9% | 0.8% |

**Percent of Population with Disabilities Employed**

| Area | 2011 Percent | 2012 Percent | Percent Change |
|---|---|---|---|
| U.S. | 33.4% | 33.5% | 0.1% |
| Minnesota | 47.7% | 42.7% | -5.0% |

*Source: ACS Data*

## Full-Time/Full-Year Employment

The ACS defines full-time status as working 35 or more hours per week and full-year status as working 50 or more weeks in a 12-month period.

**Chart 1: Full-Time/Full-Year Employment**

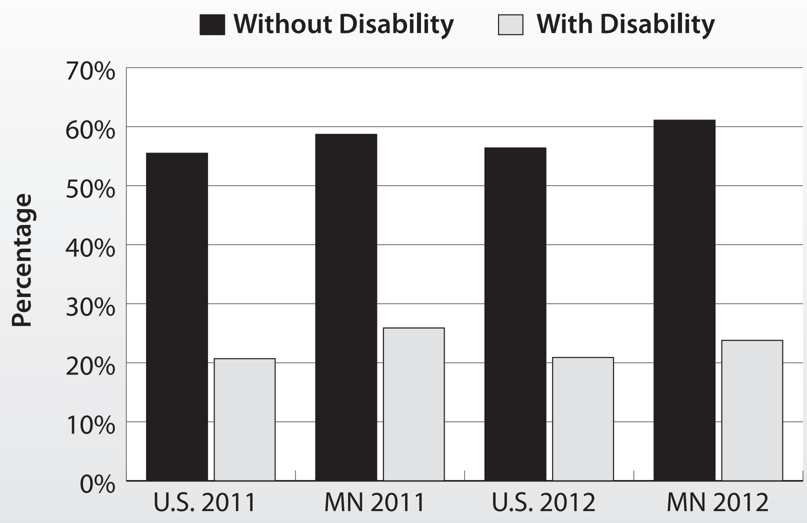



Chart 1 illustrates how employed people with disabilities continued to be less likely to maintain a full-time/full-year status than those with no disability in 2012. Although there was a 0.2 percent improvement in 2012, only 20.9 percent of working-age people with disabilities in the U.S. claimed a full-time/full-year employment status compared to 56.4 percent of workers without disabilities, an increase from 55.5 percent in 2011. In Minnesota the percent of full-time/full-year employment status among working-age people with disabilities decreased to 23.8 percent from 25.9 percent during the same time period. The full-time/full-year rate among Minnesotans in the working-age group without disabilities increased by 2.4 percent in 2012, rising from 58.7 percent in 2011 to 61.1 percent in 2012.

## Poverty

According to the Institute for Research on Poverty at the University of Wisconsin at Madison, the official U.S. poverty measure is based on the federal poverty thresholds created in 1982 and adjusted annually to be aligned with cost-of-living increases. The poverty level is calculated based on the cost of minimum food consumption with the assumption that families spend a third of their income on food. These poverty thresholds consider the size of the family and are indexed to 2008 dollars using poverty factors based on the Consumer Price Index. The poverty level in this article specifies the percentage of people with disabilities in the working-age group in the U.S. and in Minnesota who were living below the poverty line in 2012.

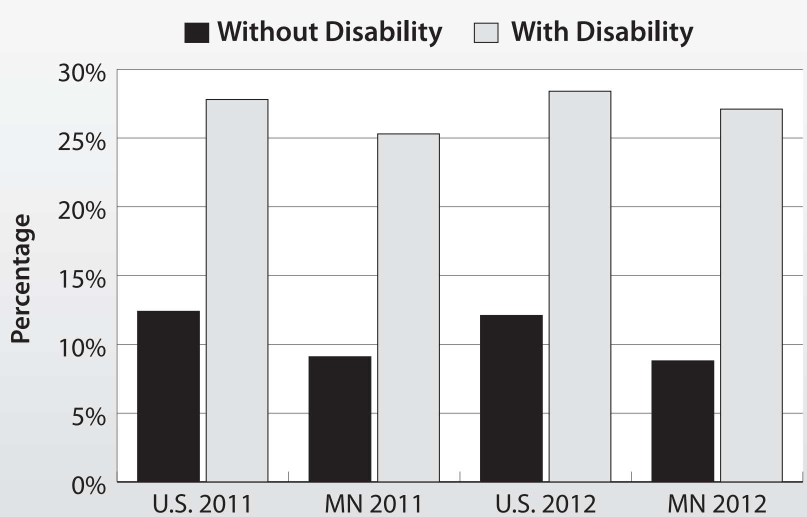
Particularly relevant to the low rates of employment and full-time/full-year status is the poverty level among people with disabilities. Chart 2 shows that in 2012 an estimated 28.4 percent of the 18,823,698 people in the working-age group with a disability in the U.S. were living below the poverty line compared to 27.8 percent in 2011. This is more than twice the rate of poverty among those of working age without disabilities, 12.1 in 2012, down about 0.4 percent from 2011. In Minnesota 27.1 percent of working-age people with disabilities were living under the poverty level in 2012, an increase of 1.8 percent from 2011 and more than three times the rate of the same age group without disabilities. Such an indicator should be considered a warning since the overall poverty rate for Minnesotans with disabilities has increased over time compared to those without disabilities whose poverty level decreased from 9.1 percent in 2011 to 8.8 percent in 2012.

## Conclusion

People with disabilities are still under-employed in Minnesota and nationwide. Even the advances made in recent years have proved to be insufficient to meet the needs of people with disabilities who are participating in the workforce, both those who are employed and those searching for employment. People with disabilities in Minnesota and in the nation benefit from measures taken to enhance their employment opportunities in government agencies, but they still suffer from underemployment economy-wide. There is more to be accomplished to offer those with disabilities the lives they deserve.

by Mohamed Mourssi Alfash
Labor Market Information Office
Minnesota Department of Employment
and Economic Development

### Chart 2: Poverty Level Comparison: Disability vs. No Disability

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